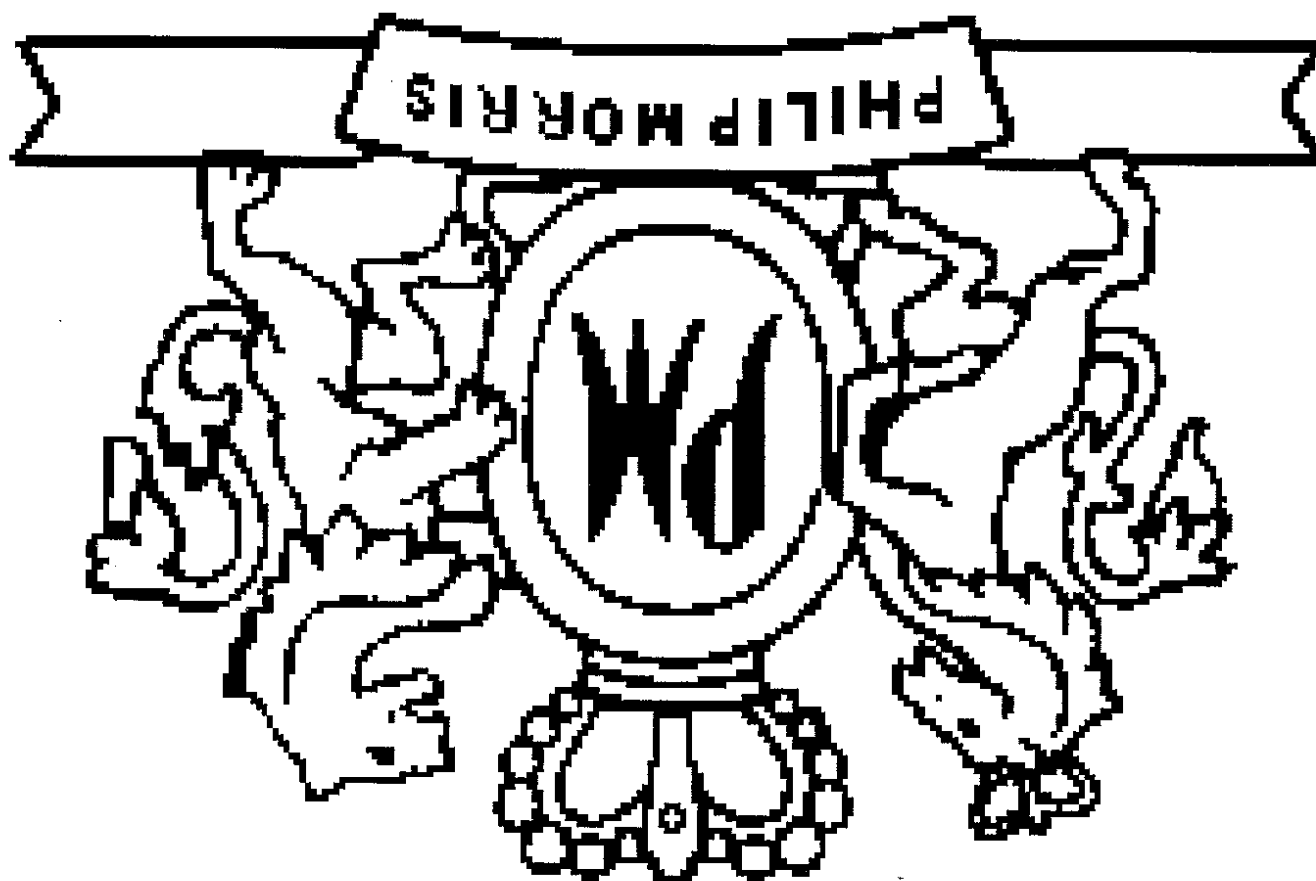


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JANUARY 1997



MONTHLY PROMOTIONS MEETING

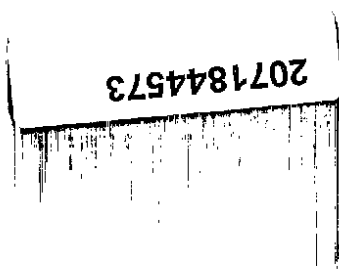
2071844572

**MARLBORO HOLIDAY SPECIAL / OFFER**

## PROGRAM OBJECTIVES/STRATEGIES

### Holiday Special (Retail Masters Stores)

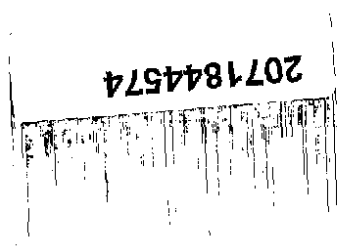
- Reward smokers with a discount of at least 20¢ per pack/\$2.00 per carton on Marlboro during the five week period ending 12/29/96.
- Communicate the offer with supporting POS
- Reward smokers with a complimentary copy of the first issue of the Unlimited-Action magazine via reply cards
- Communicate the magazine offer with POS and reply cards



## **PROGRAM OBJECTIVES/STRATEGIES (Cont'd)**

### **Holiday Offer (Non Retail Masters Stores)**

- Reward smokers with a complimentary copy of the first issue of the Unlimited-Action magazine via reply cards.
- Communicate the magazine offer with POS and reply cards



## FIELD SALES OBJECTIVES/RESULTS

### OBJECTIVE

- Penetrate 90% of Retail Masters accounts
- Penetrate 50% of Non Retail Masters accounts
- Place POS with price call out in all participating RM stores
- Place reply cards in all participating stores

### RESULTS

- 81% of Retail Masters stores offered money-off deals
- 24% of Non Retail Masters stores had the magazine offer
- Among RM stores with any money-off, 89% had visible price call-out
- 82% of participating RM stores had the magazine reply cards

2071844575

## SUMMARY FINDINGS

- Share gains met or exceeded previous Marlboro Money-off programs
- Penetration reached record high level in Retail Masters stores
- Among Retail Masters stores that participated, strong POS penetration was evident (average 3.3 POS items per participating store).
- Competitive promotional response appeared somewhat lower than during the year-end 1995 program

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# **PM-USA**

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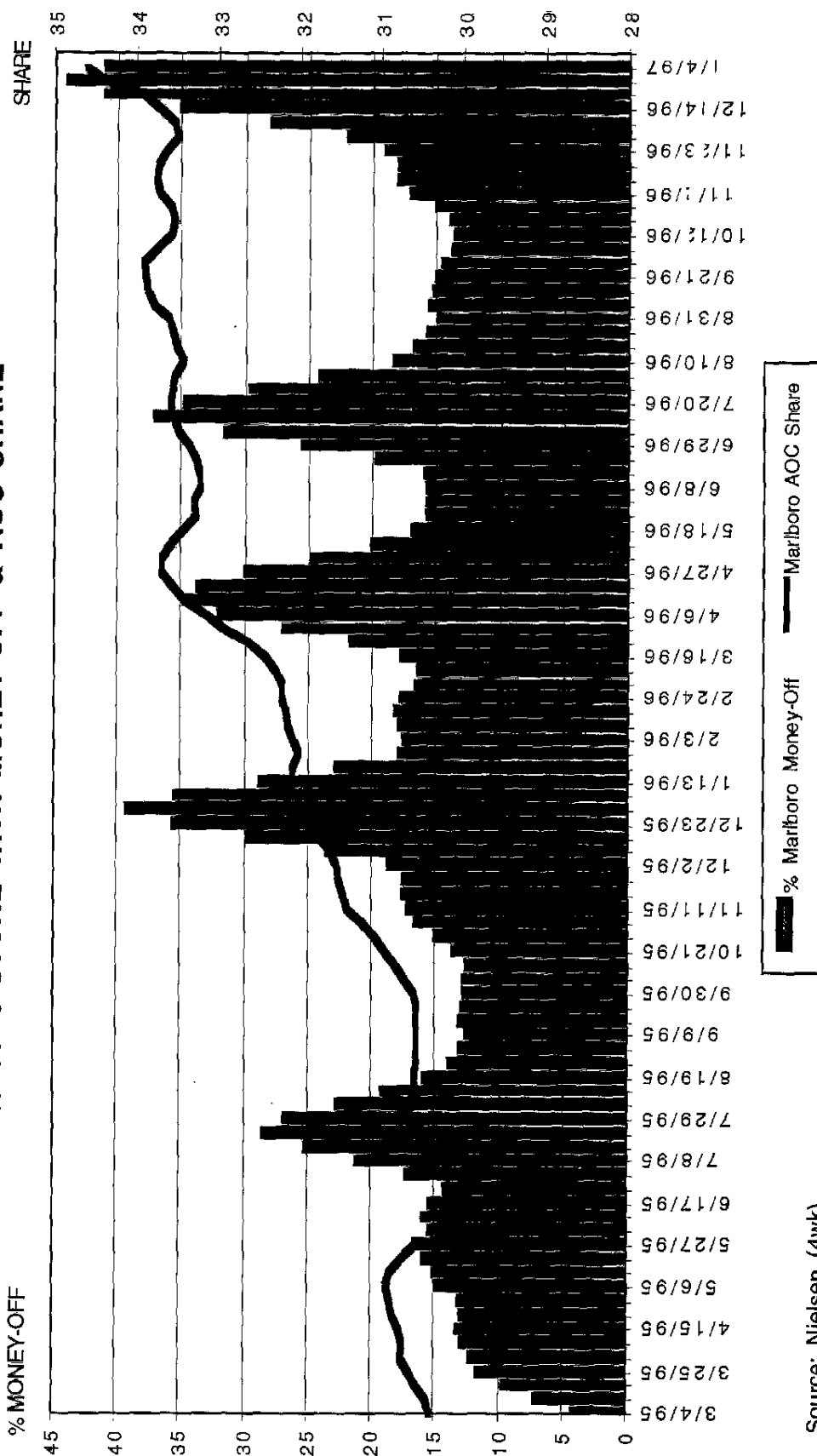
## **ISSUES/CONCERNS**

- Non-Retail Masters penetration
- Utilization of some POS materials & temporary displays
- Gap between communication of price & equity elements (magazine offer)

2071844577

# PM-USA

## MARLBORO % OF C-STORE WITH MONEY-OFF & AOC SHARE



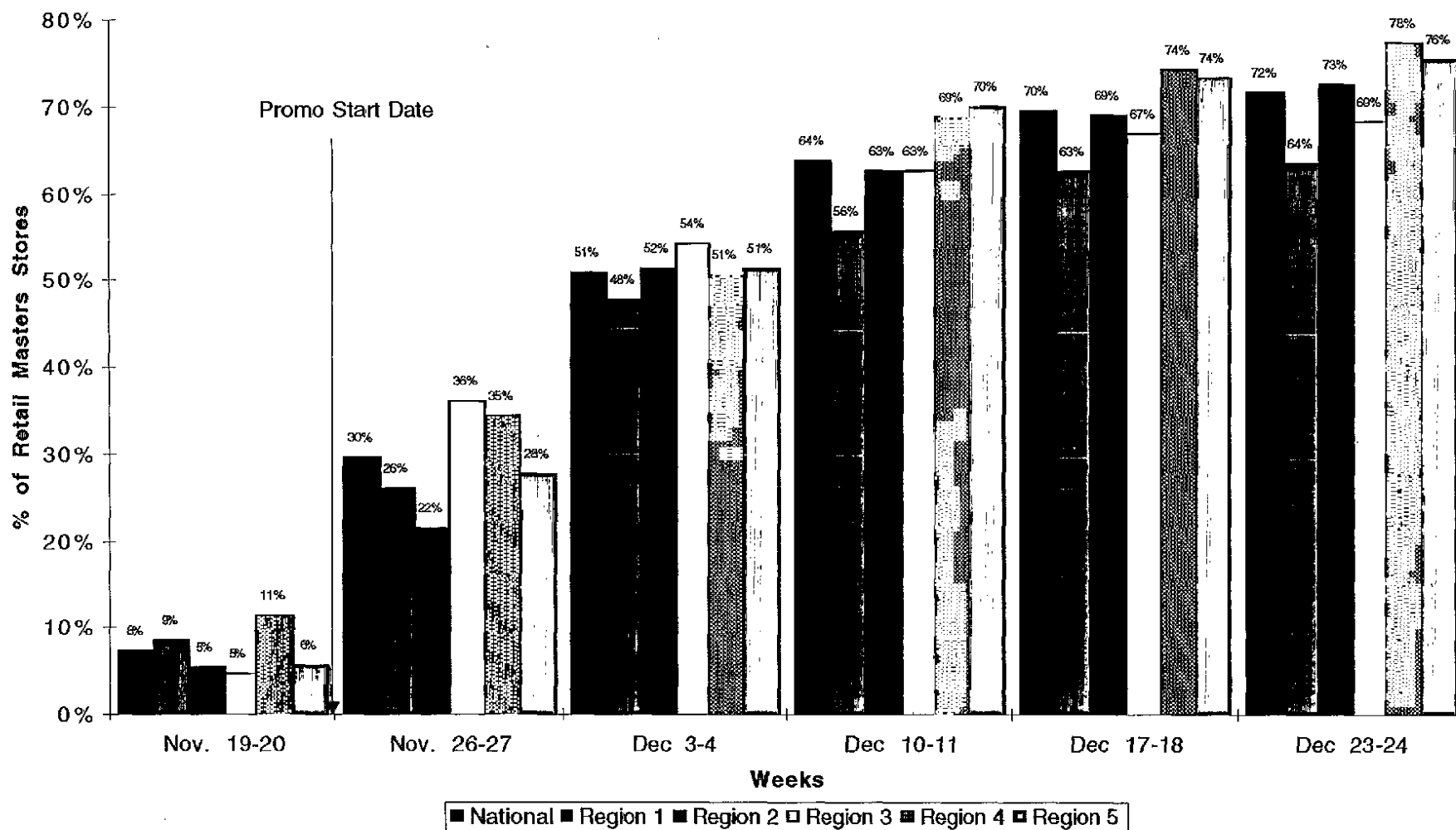
Source: Nielsen (4wk)

2071844578



# PM-USA

## Marlboro Holiday Special - Visible Money Off



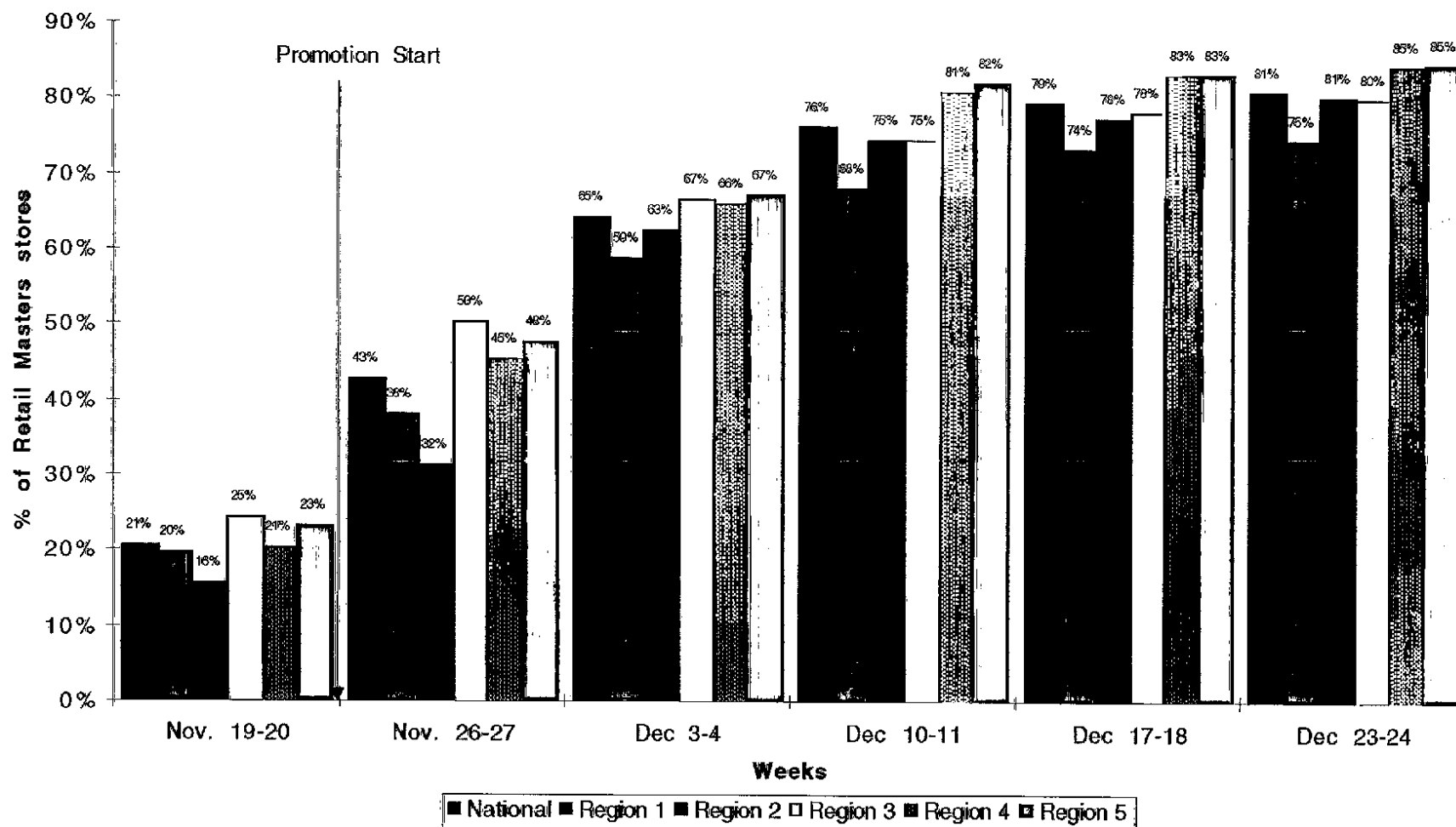
Source: Full Line Research Store Audits

\*Denotes RM stores with Holiday Special POS and price reduction communication

2071844579

# PM-USA

## Marlboro Holiday Special - Total Money Off

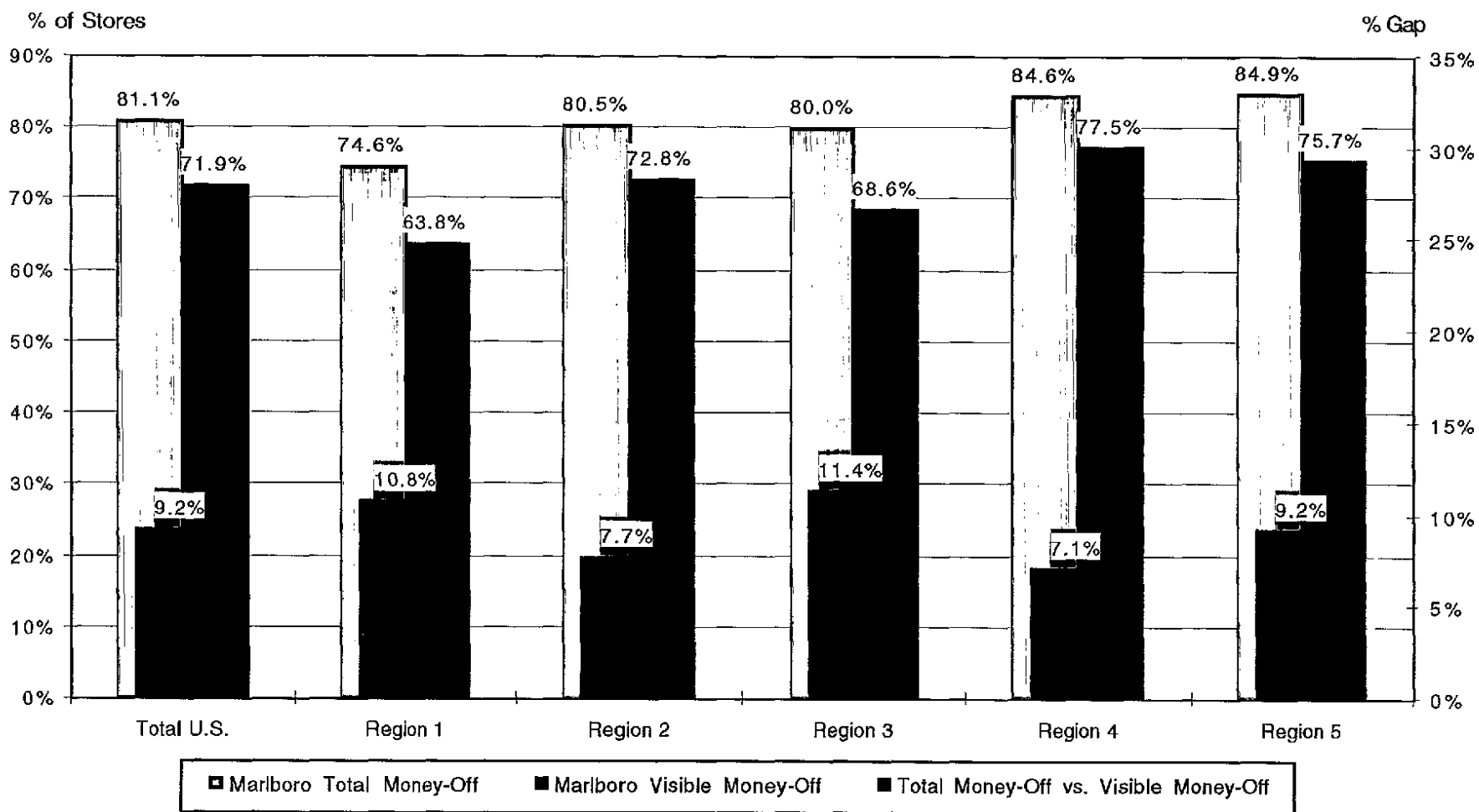


Source: Full Line Research Audits

\*Denotes RM stores w/Visible or Quiet Money Off

2071844580

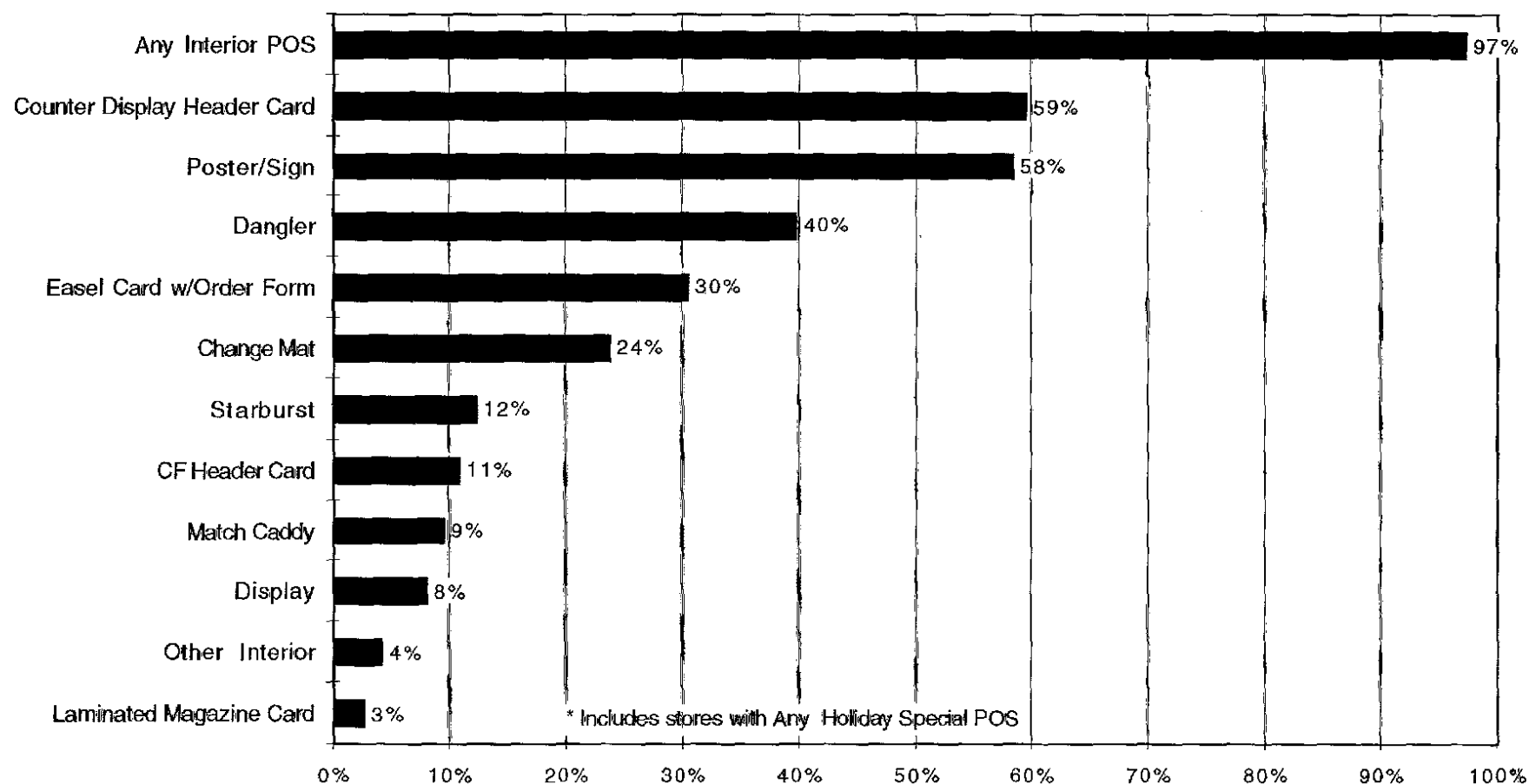
## Marlboro Money-Off Cumulative Incidence Retail Masters Stores



Source: Full Line Research

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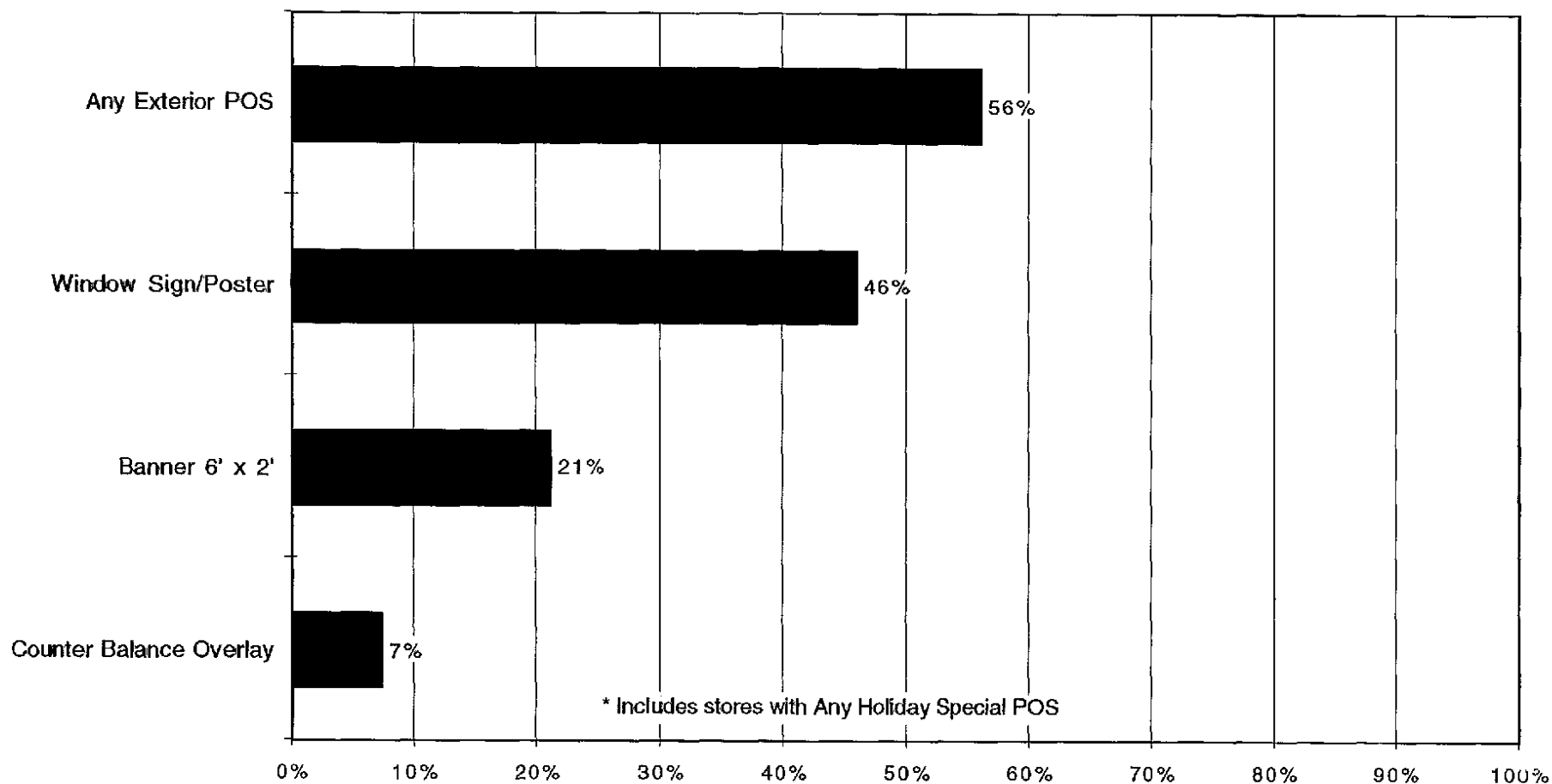
## % of Stores with Interior POS Among RM Stores Participating in Holiday Special\*



Source: FLR (Cumulative Program Period - Total U.S.)

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## % of Stores with Exterior POS Among RM Stores Participating in Holiday Special\*

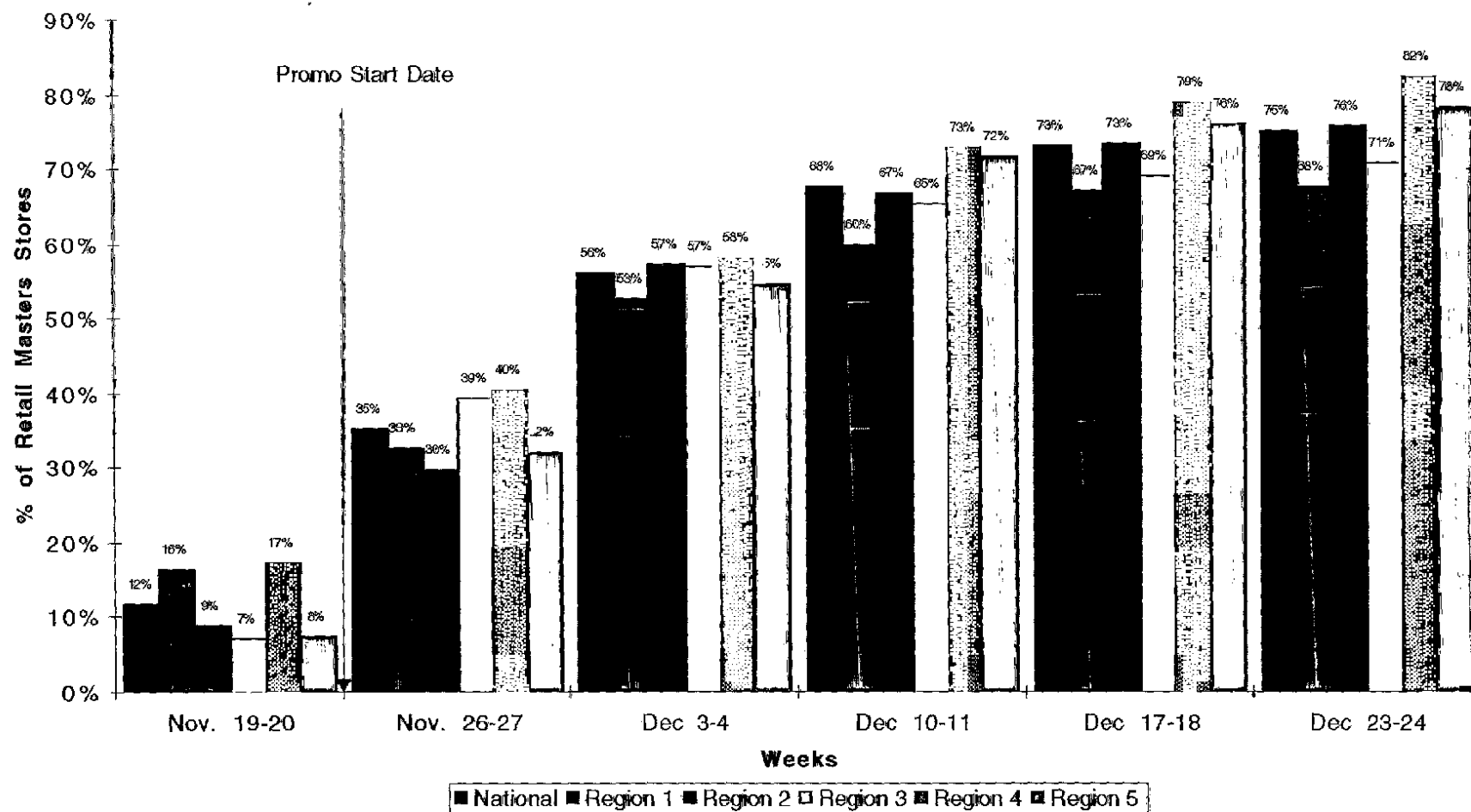


Source: FLR (Cumulative Program Period - Total U.S.)

2071844583

# PM-USA

## Marlboro Holiday Special POS - Retail Masters



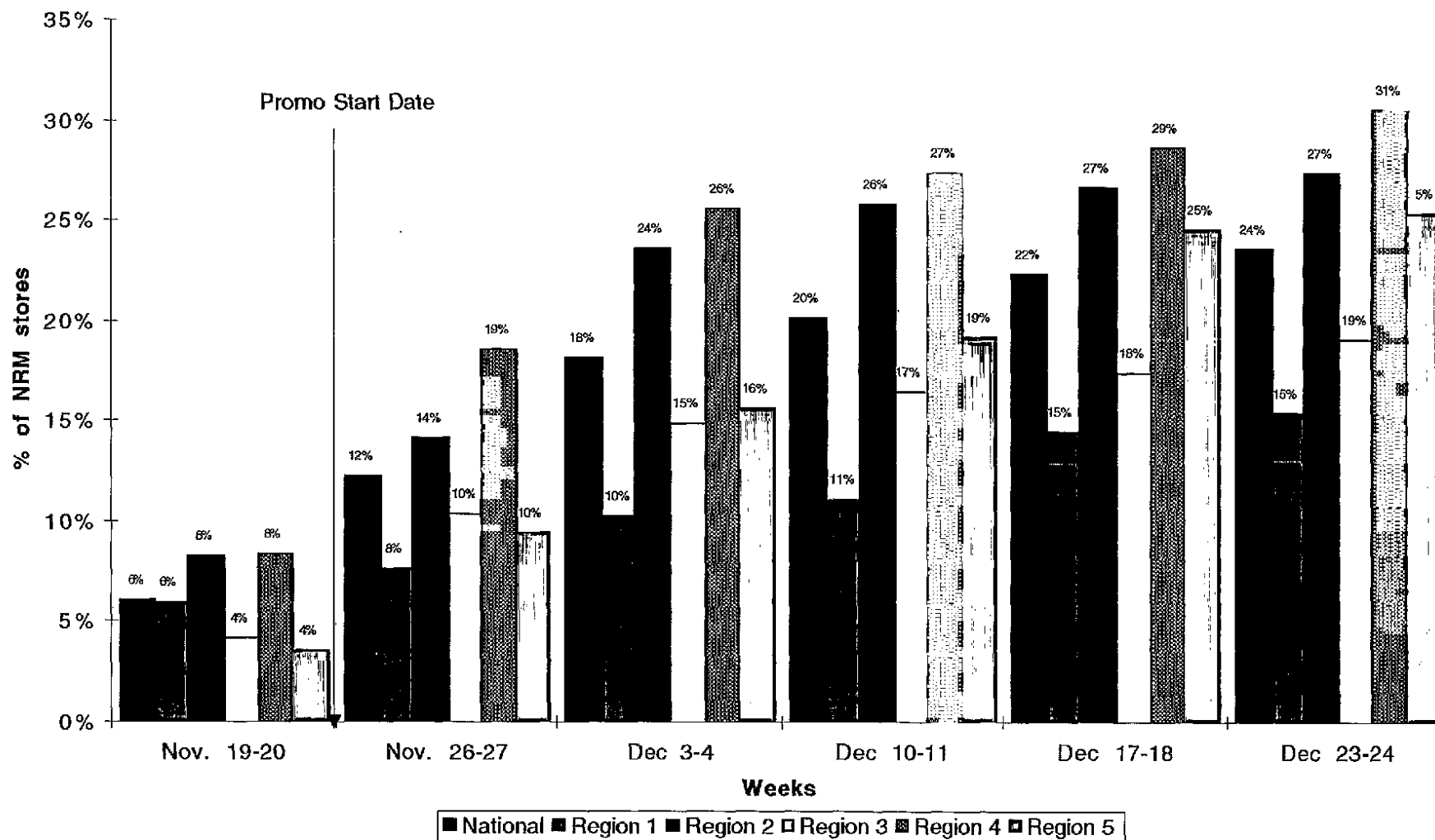
Source: Full Line Research Store Audits

\*Denotes RM stores with Marlboro Holiday Special POS

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# PM-USA

## Marlboro Holiday Offer - Non Retail Masters Stores



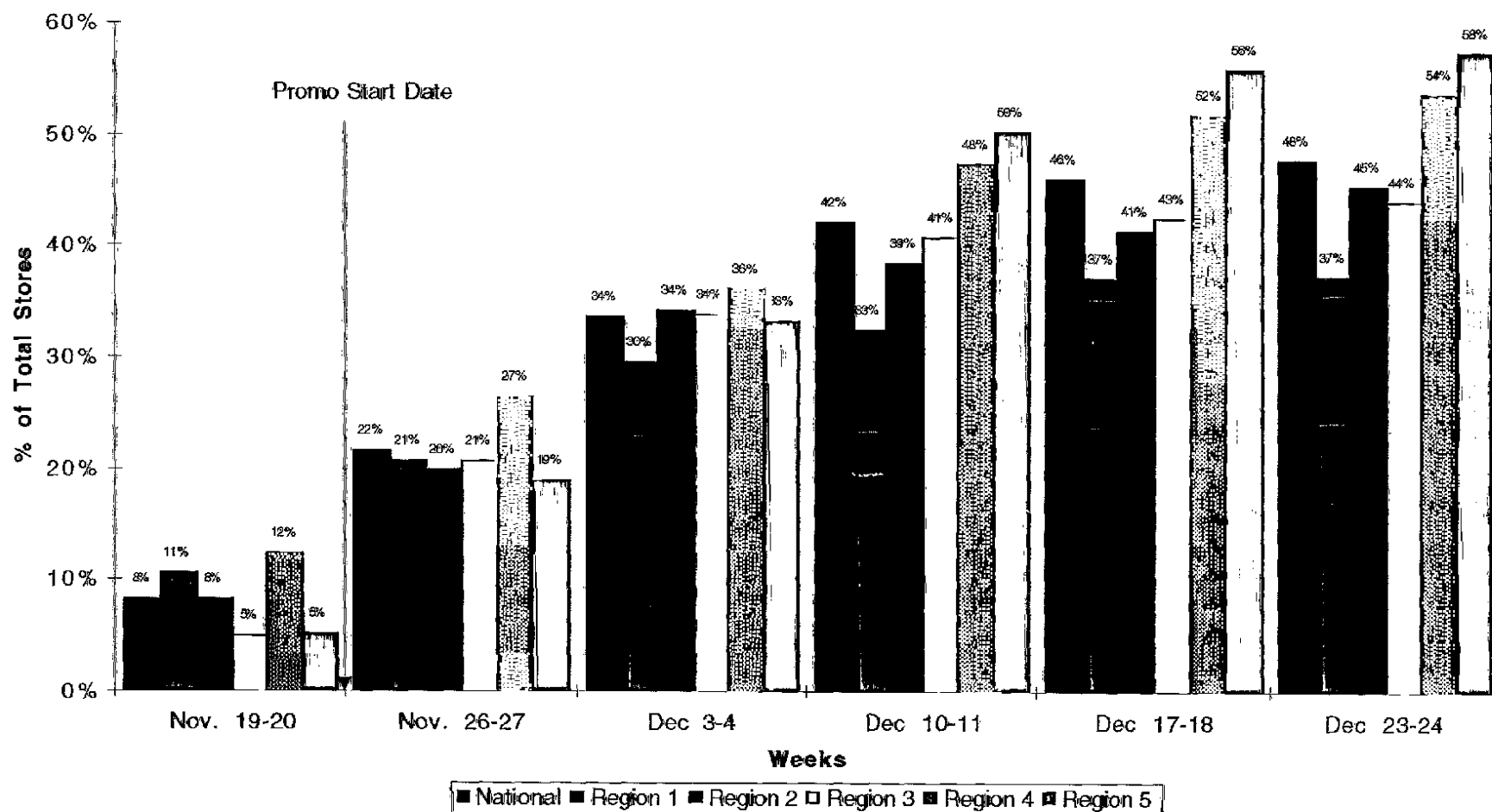
Source: Full Line Research Store Audits

\*Denotes NRM stores with any Marlboro Holiday Offer POS and Magazine order forms

2071844585

# PM-USA

## Unlimited Magazine Order Forms



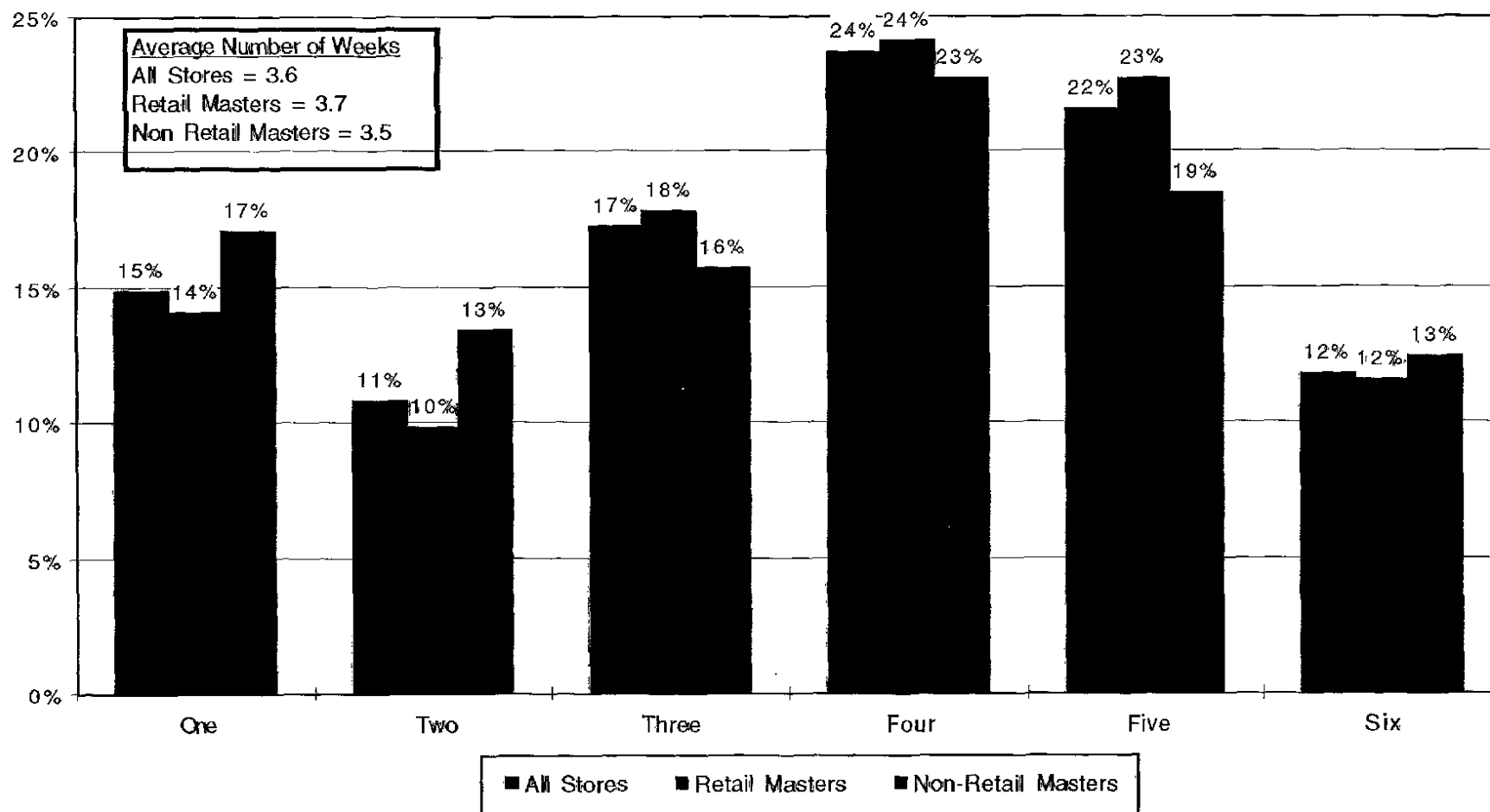
Source: Full Line Research Weekly Store Audits

\*Denotes All stores with Marlboro Unlimited Magazine Order Forms

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## Number of Weeks Magazine Forms Were Available Among All Stores with Magazine Forms

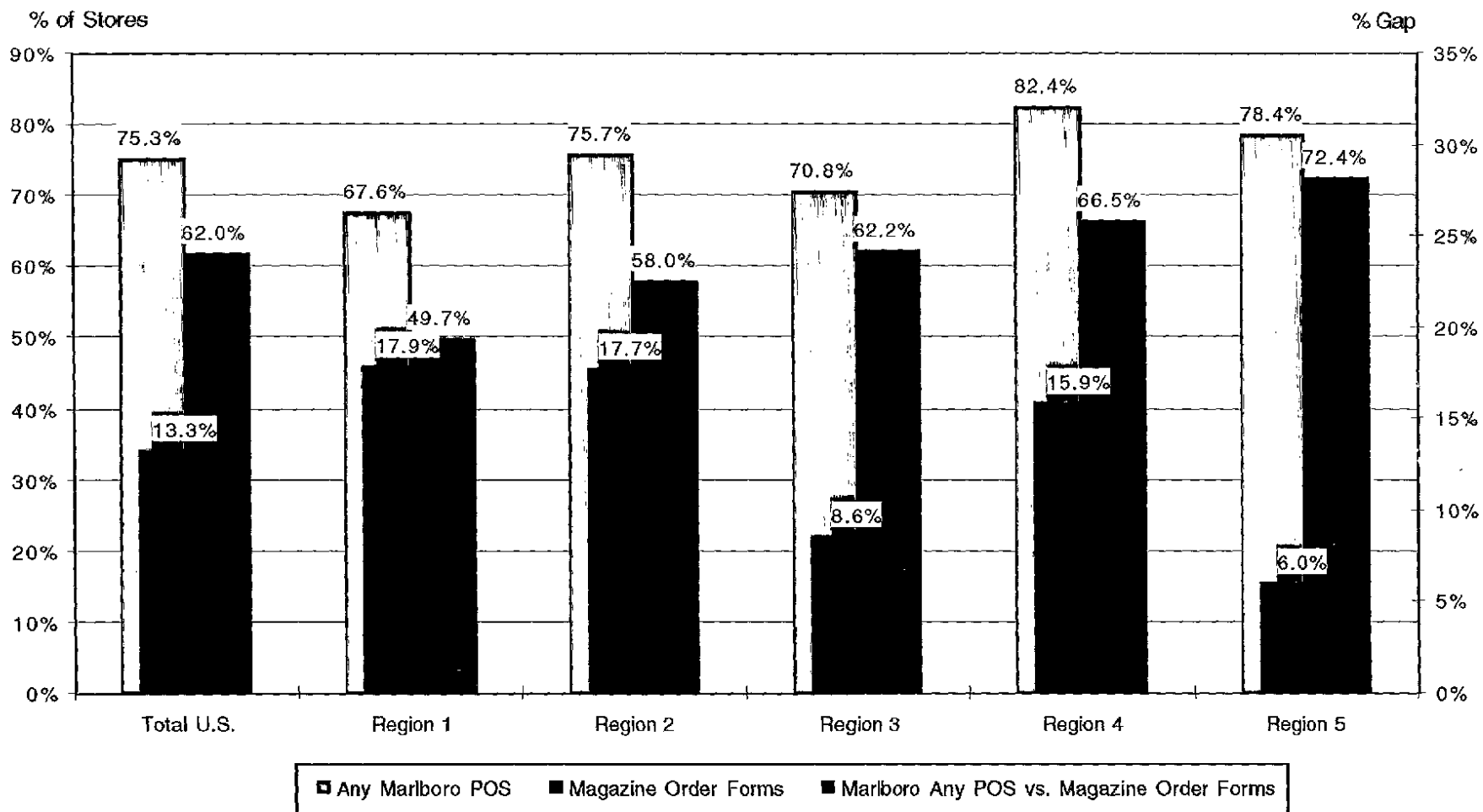


Source: FLR (Total U.S.)

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# PM-USA

## Marlboro Holiday Special POS versus Magazine Order Forms Cumulative Incidence Retail Masters Stores

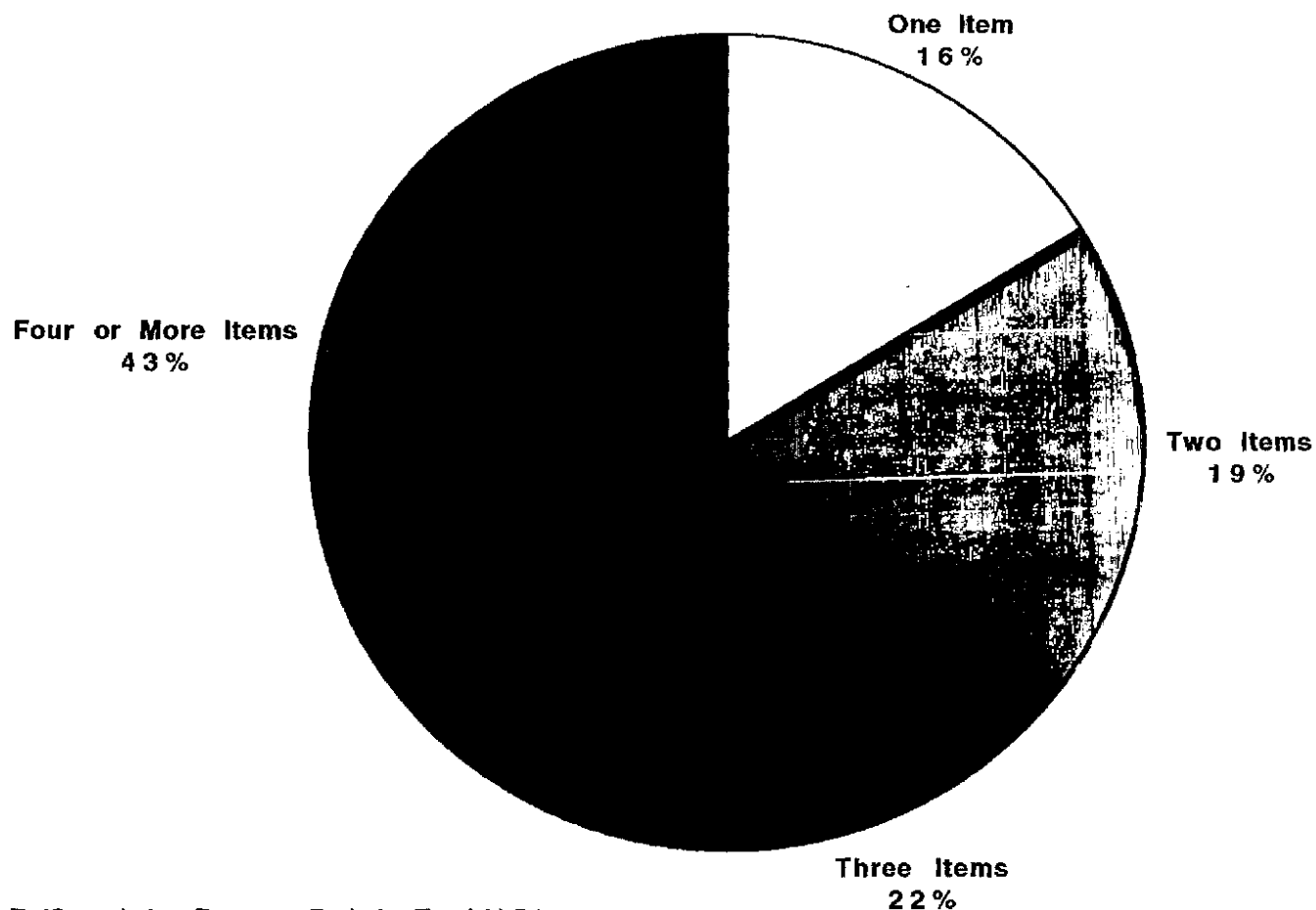


Source: Full Line Research

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# PM-USA

## Number of Marlboro POS Items per Store Among RM Stores with any Holiday Special POS

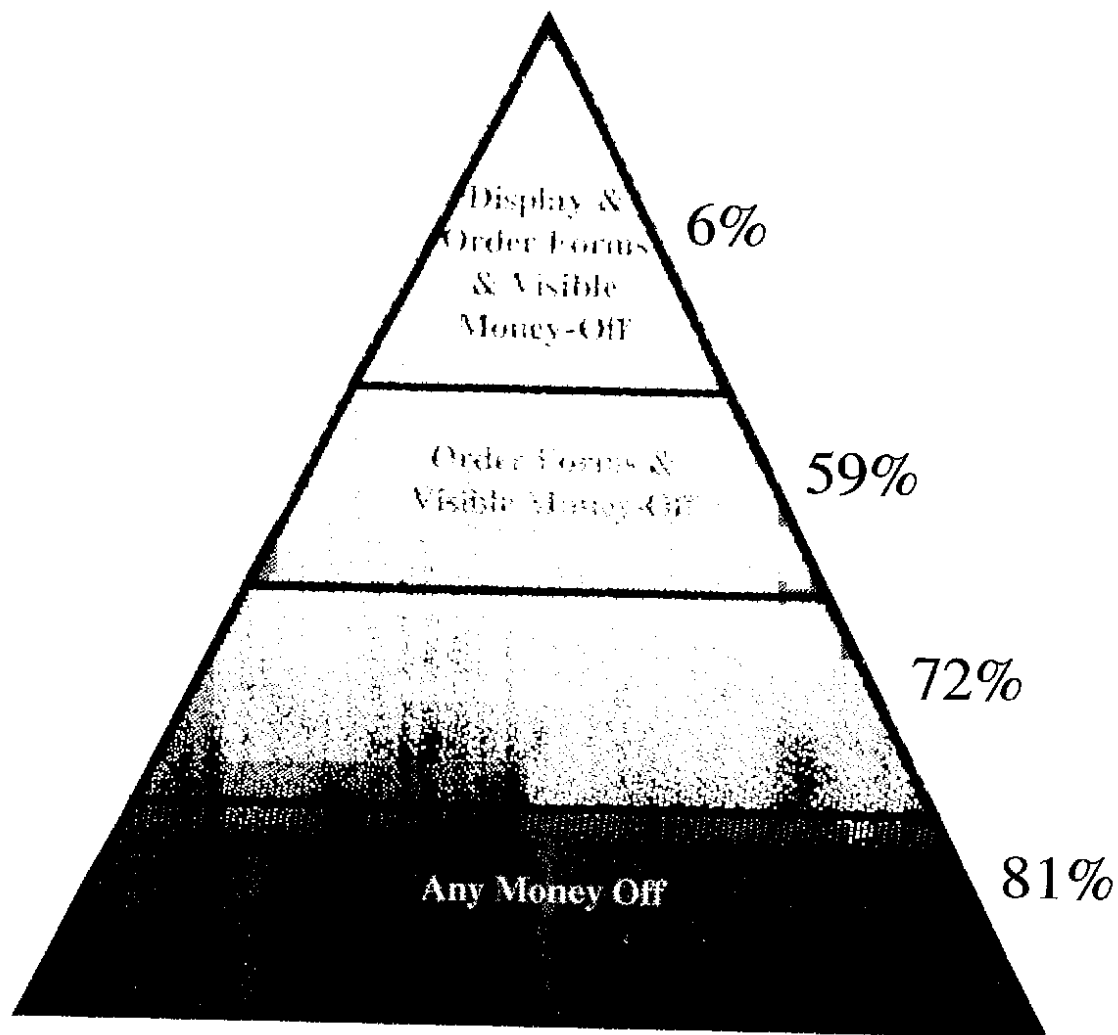


Source: FLR (Cumulative Program Period - Total U.S.)

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# RETAIL IMPLEMENTATION PYRAMID

(% of Retail Masters Stores)



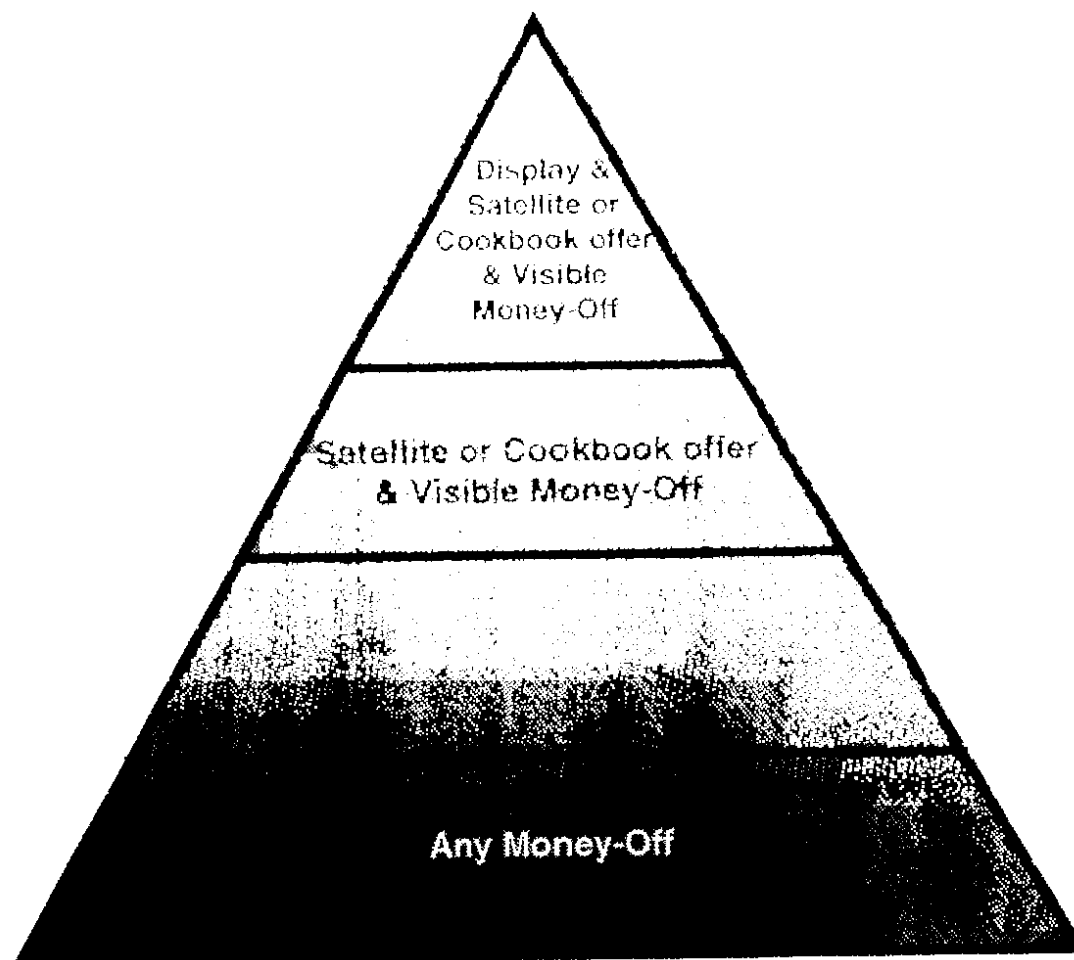
Source: Full Line Research

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**PM-USA**

## **RETAIL IMPLEMENTATION - MUBSS**

(% of Retail Masters Stores)



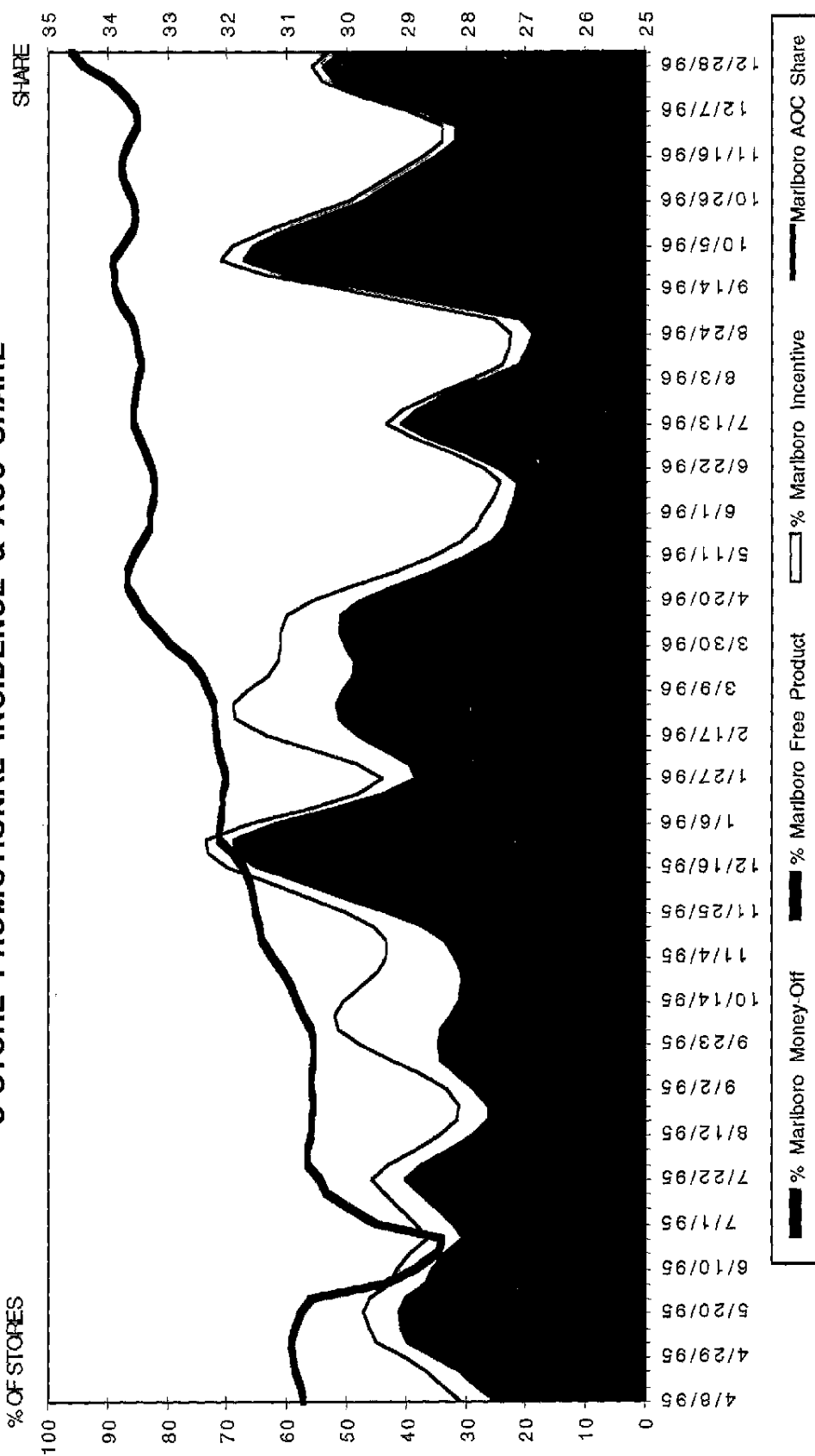
Source: Full Line Research

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# PM-USA

## MARLBORO C-STORE PROMOTIONAL INCIDENCE & AOC SHARE

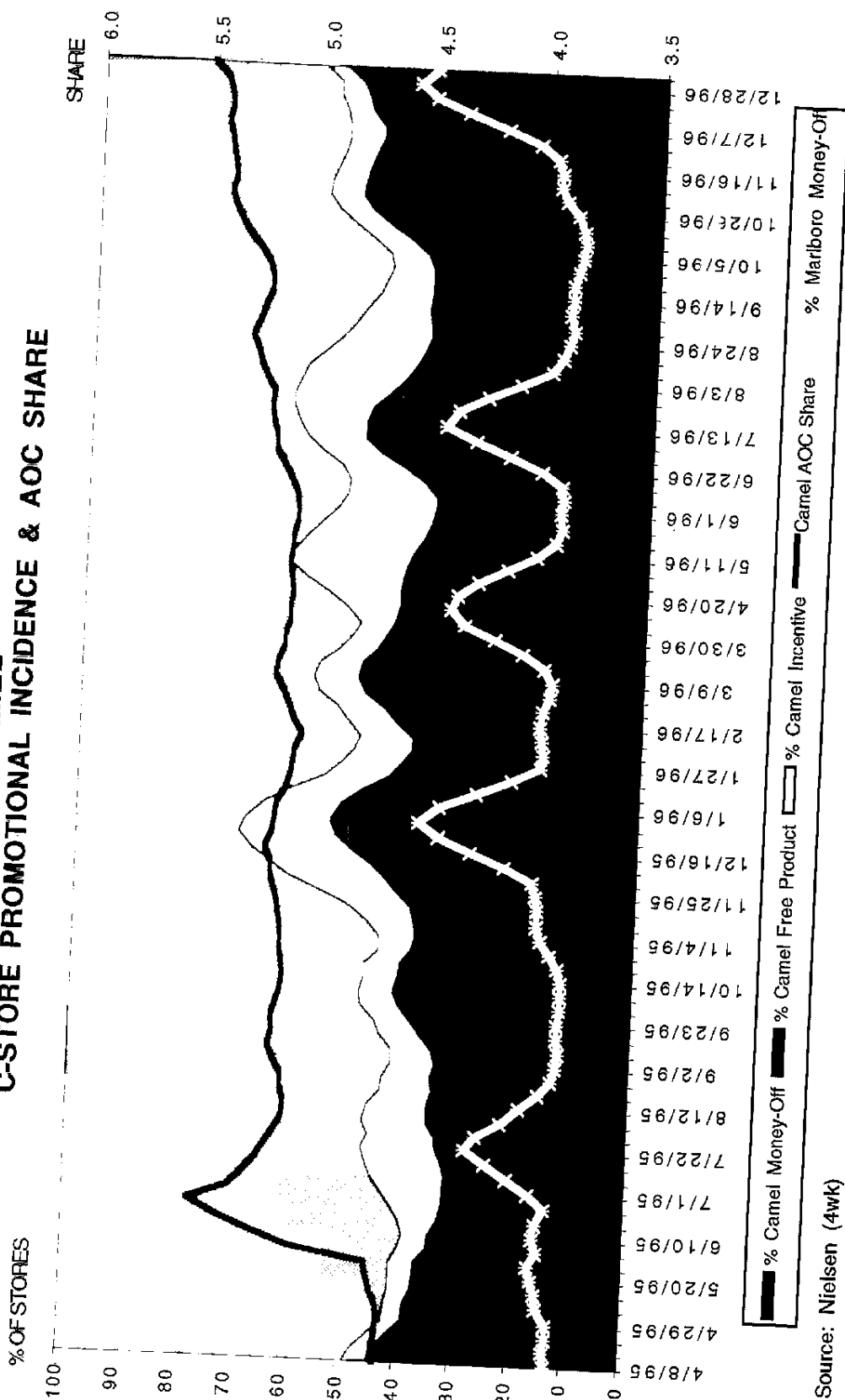


Source: Nielsen (4wk)

2071844592

# PM-USA

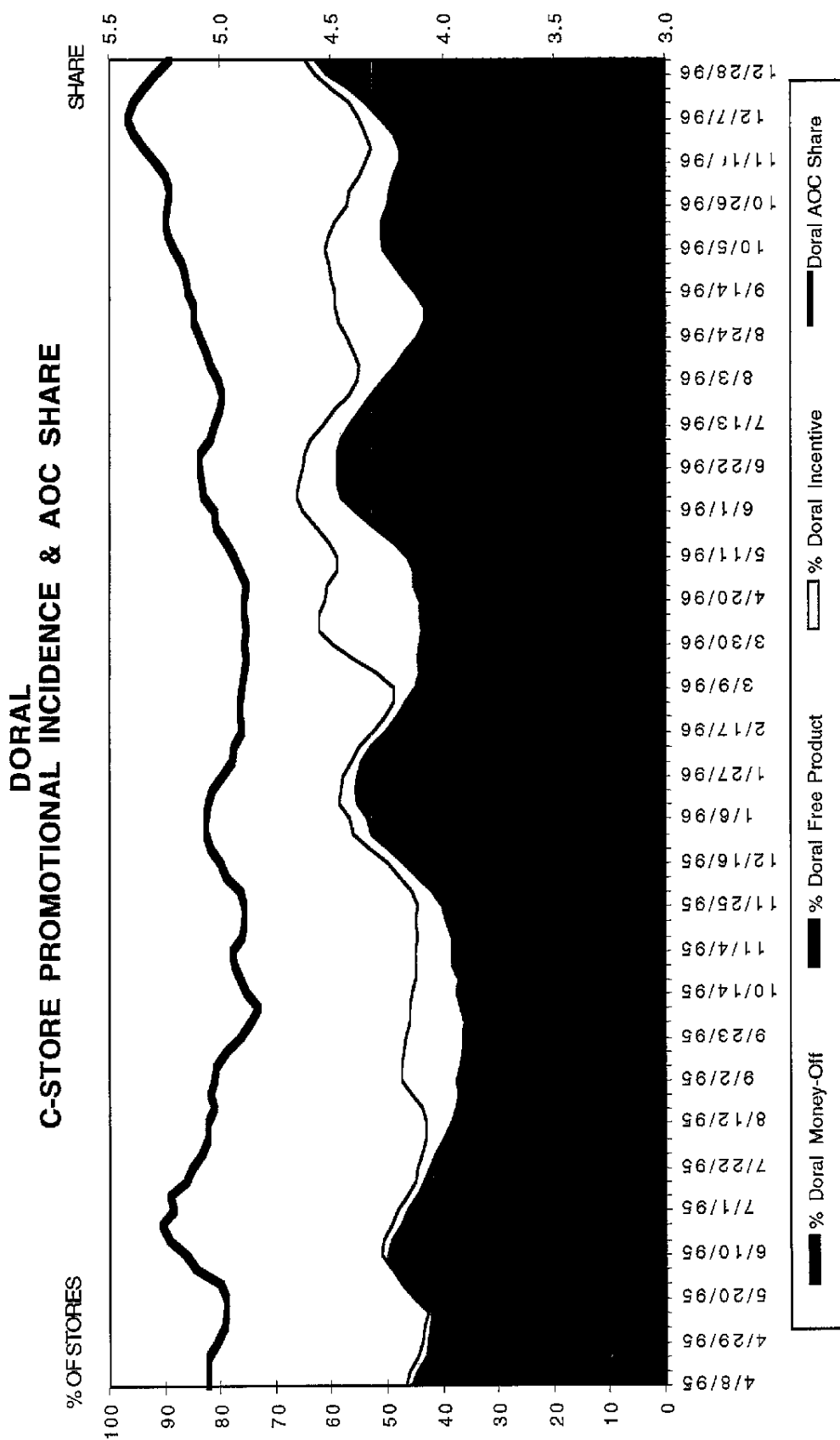
## CAMEL C-STORE PROMOTIONAL INCIDENCE & AOC SHARE



Source: Nielsen (4wk)

2071844593

# PM-USA



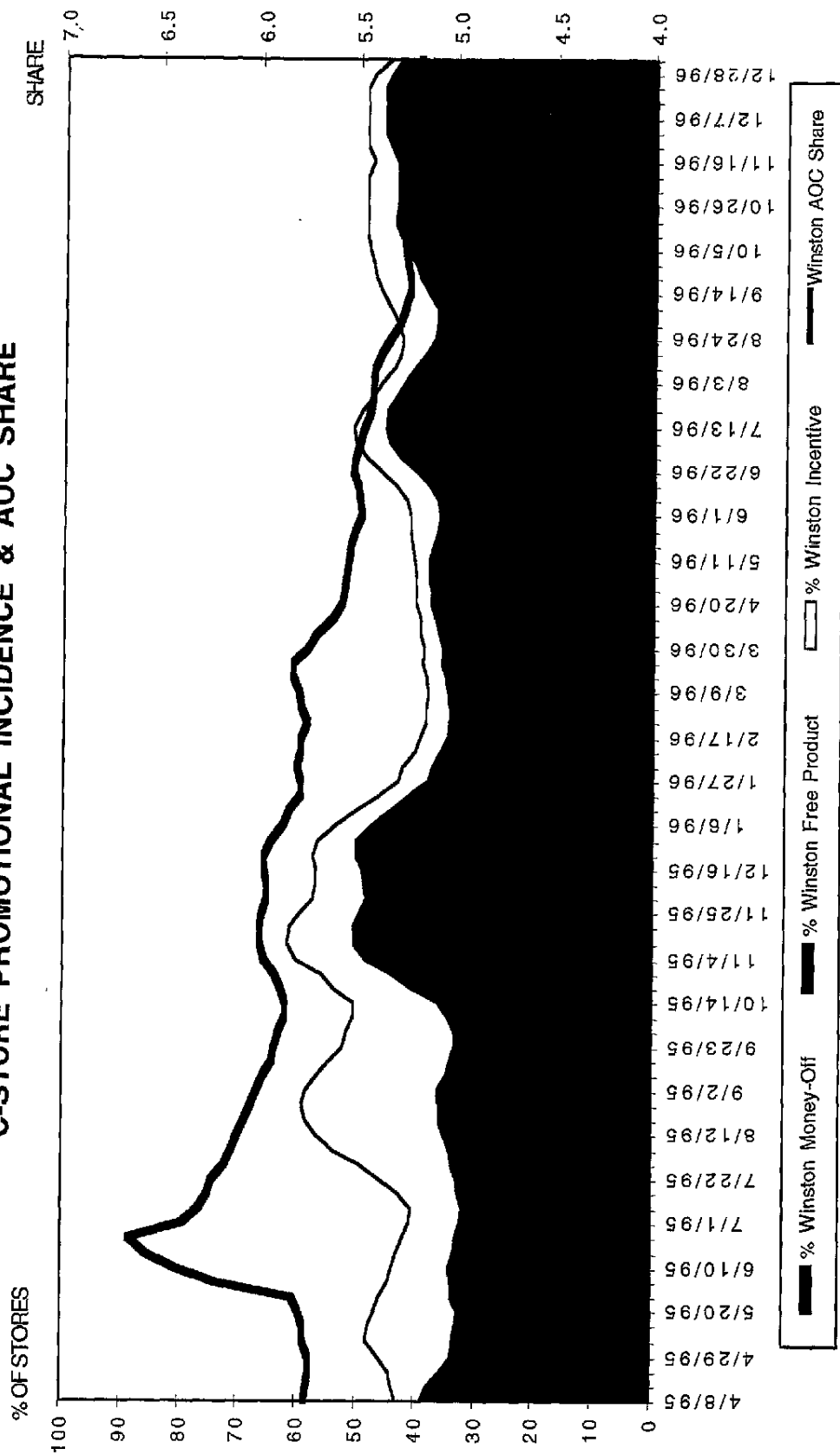
Source: Nielsen (4wk)

2071844594



# PM-USA

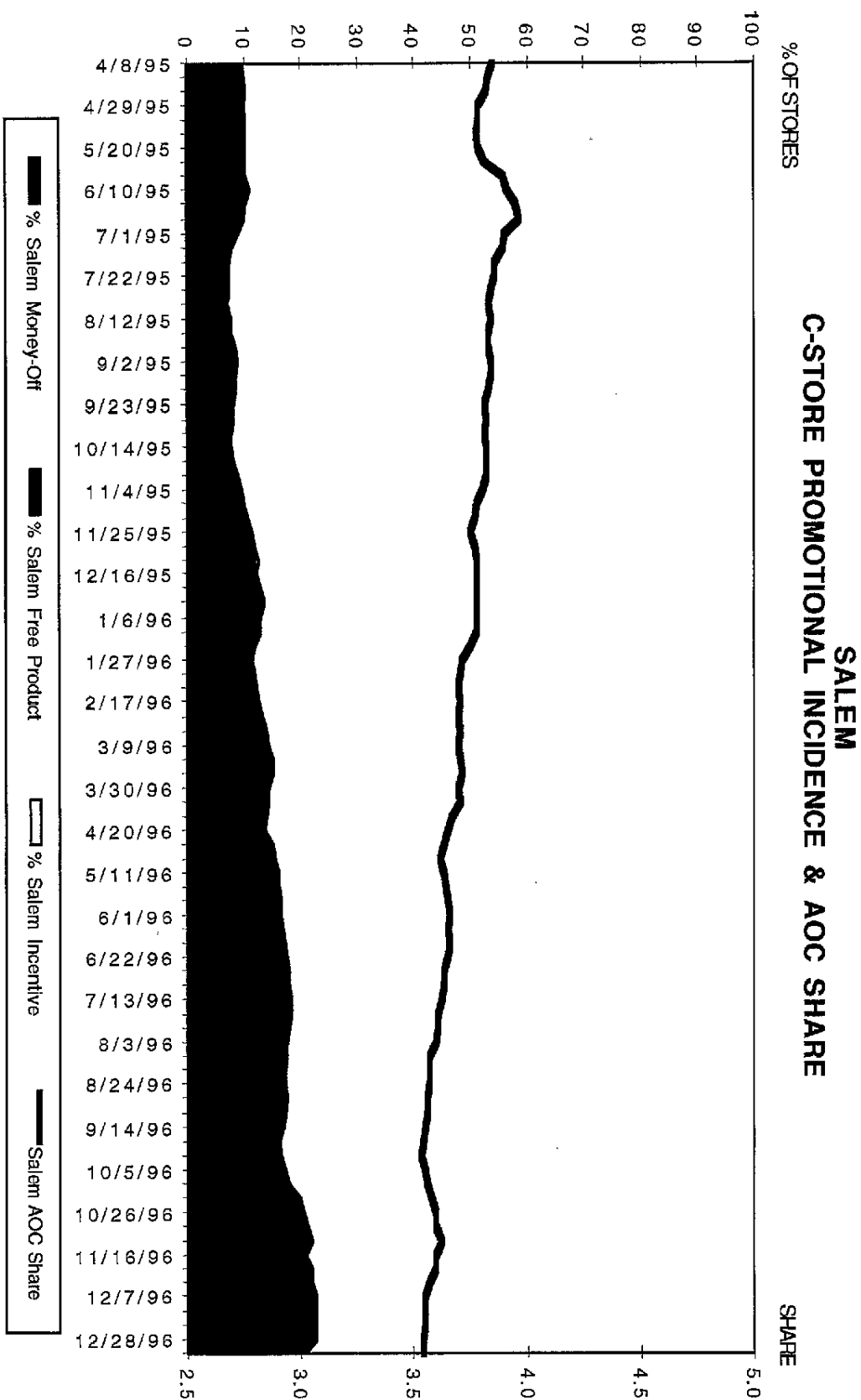
## WINSTON C-STORE PROMOTIONAL INCIDENCE & AOC SHARE



Source: Nielsen (4wk)

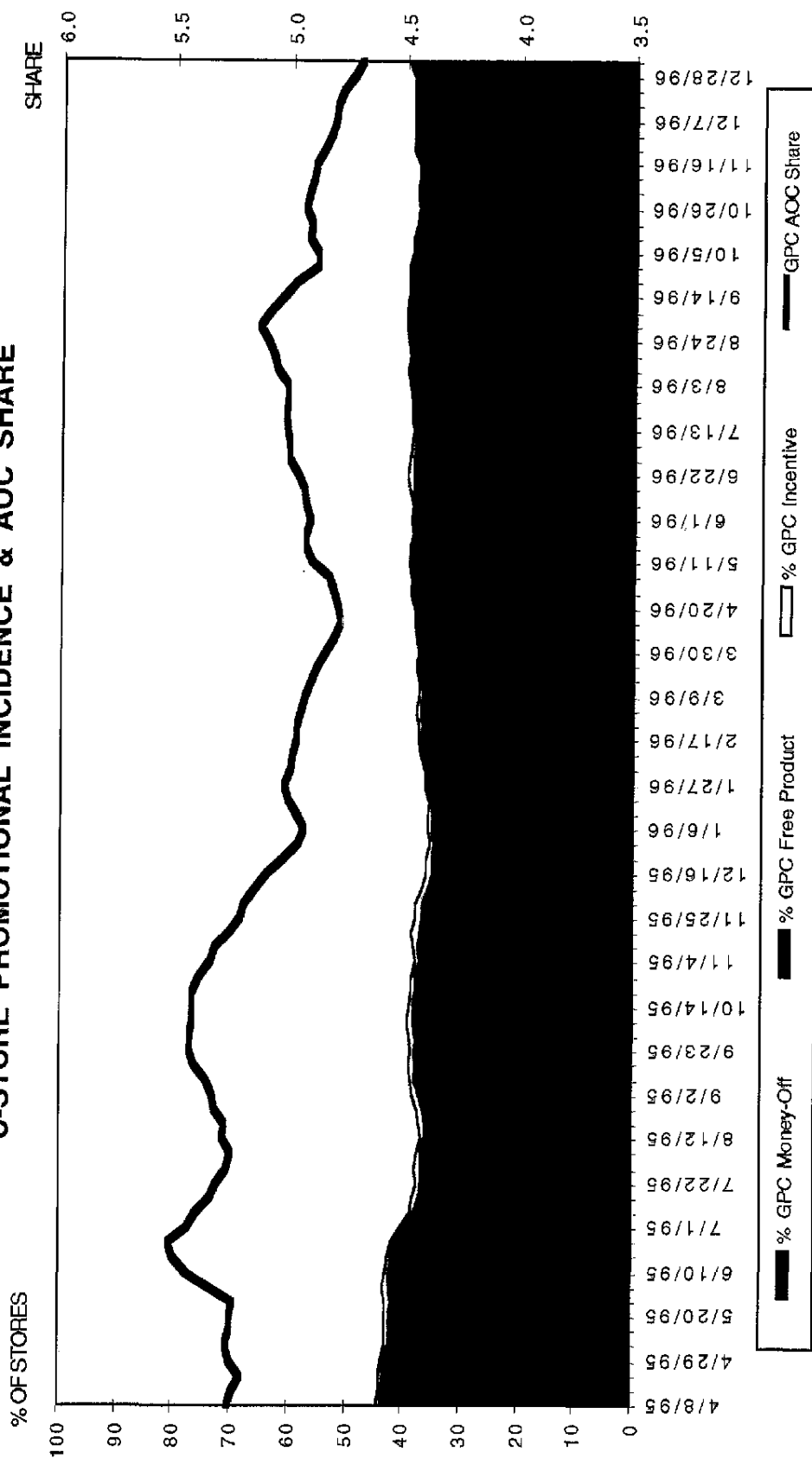
2071844595

# PM-USA



# PM-USA

## GPC C-STORE PROMOTIONAL INCIDENCE & AOC SHARE



Source: Nielsen (4wk)

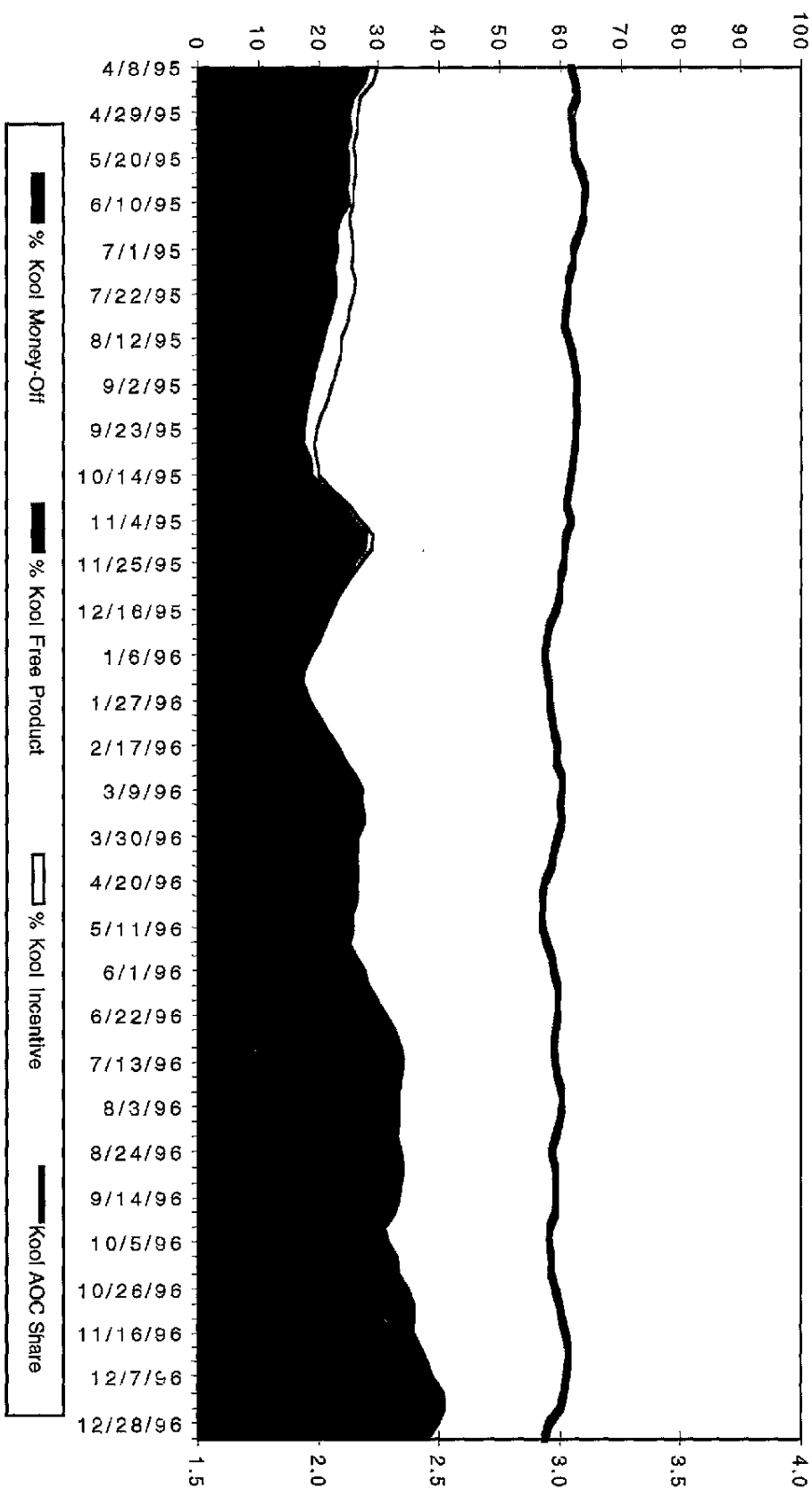
2071844597

# PM-USA

% OF STORES

## KOOL C-STORE PROMOTIONAL INCIDENCE & AOC SHARE

SHARE

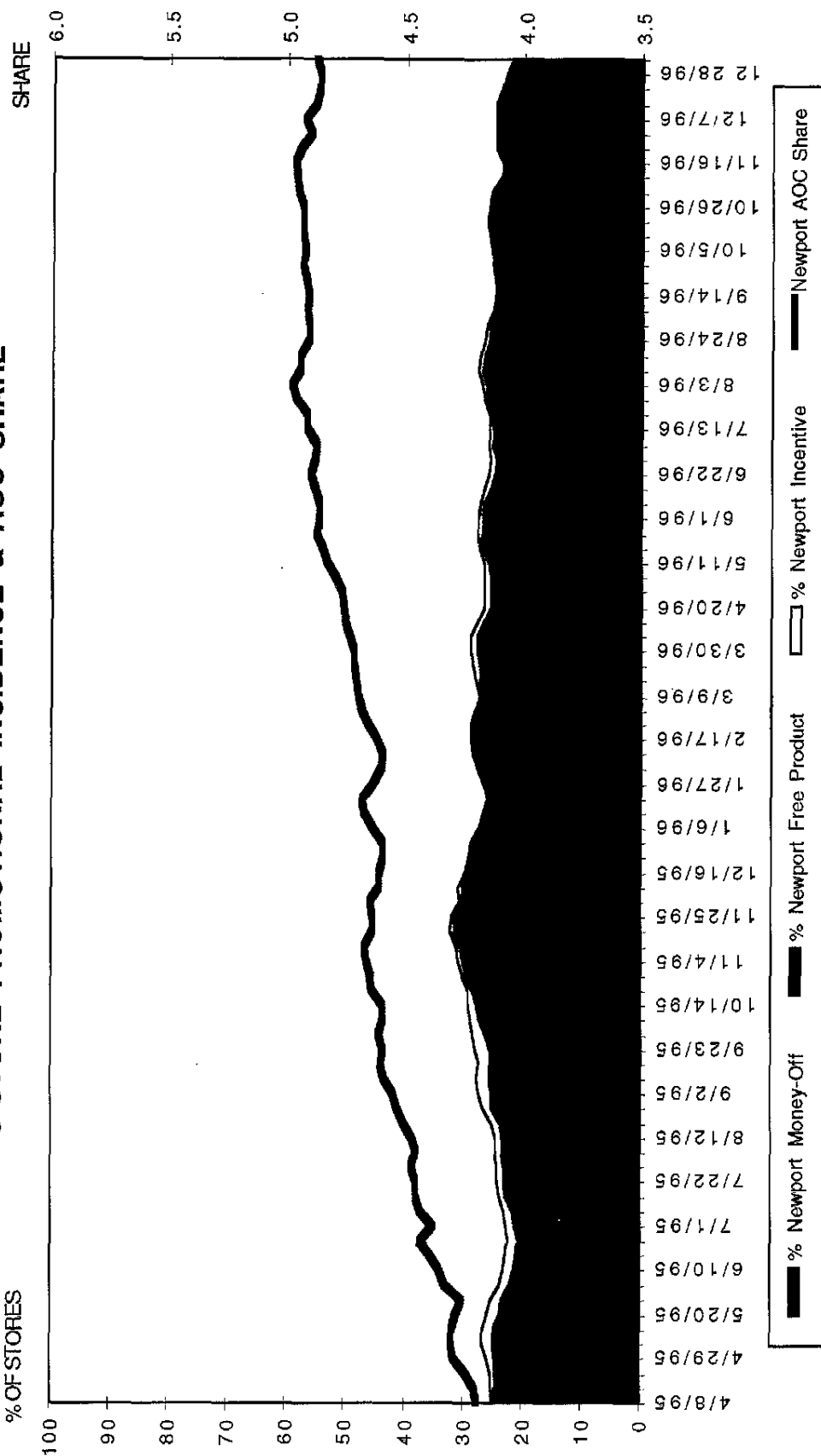


Source: Nielsen (4wk)

2071844598

# PM-USA

## NEWPORT C-STORE PROMOTIONAL INCIDENCE & AOC SHARE

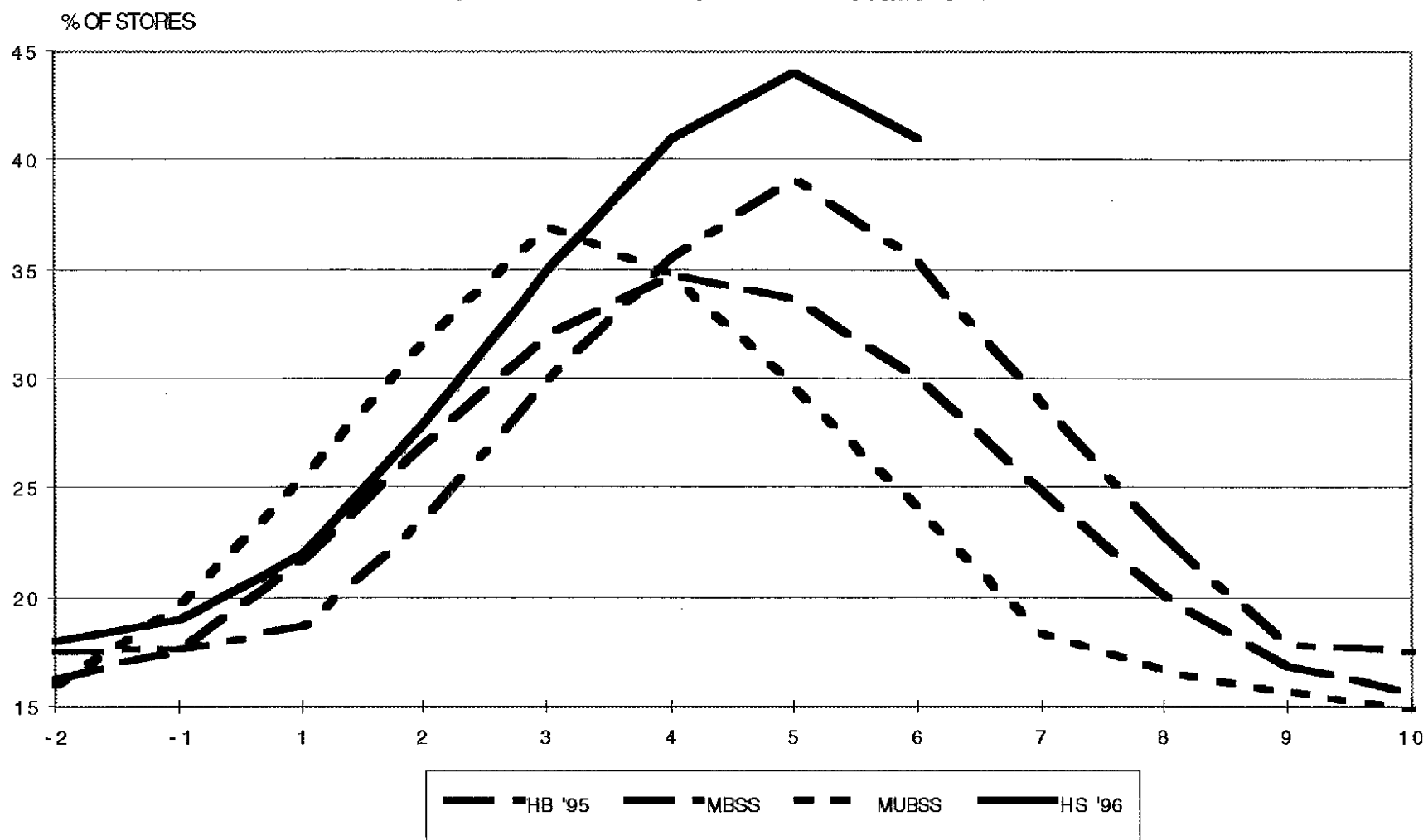


Source: Nielsen (4wk)

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# PM-USA

## MARLBORO % OF C-STORES WITH MONEY-OFF

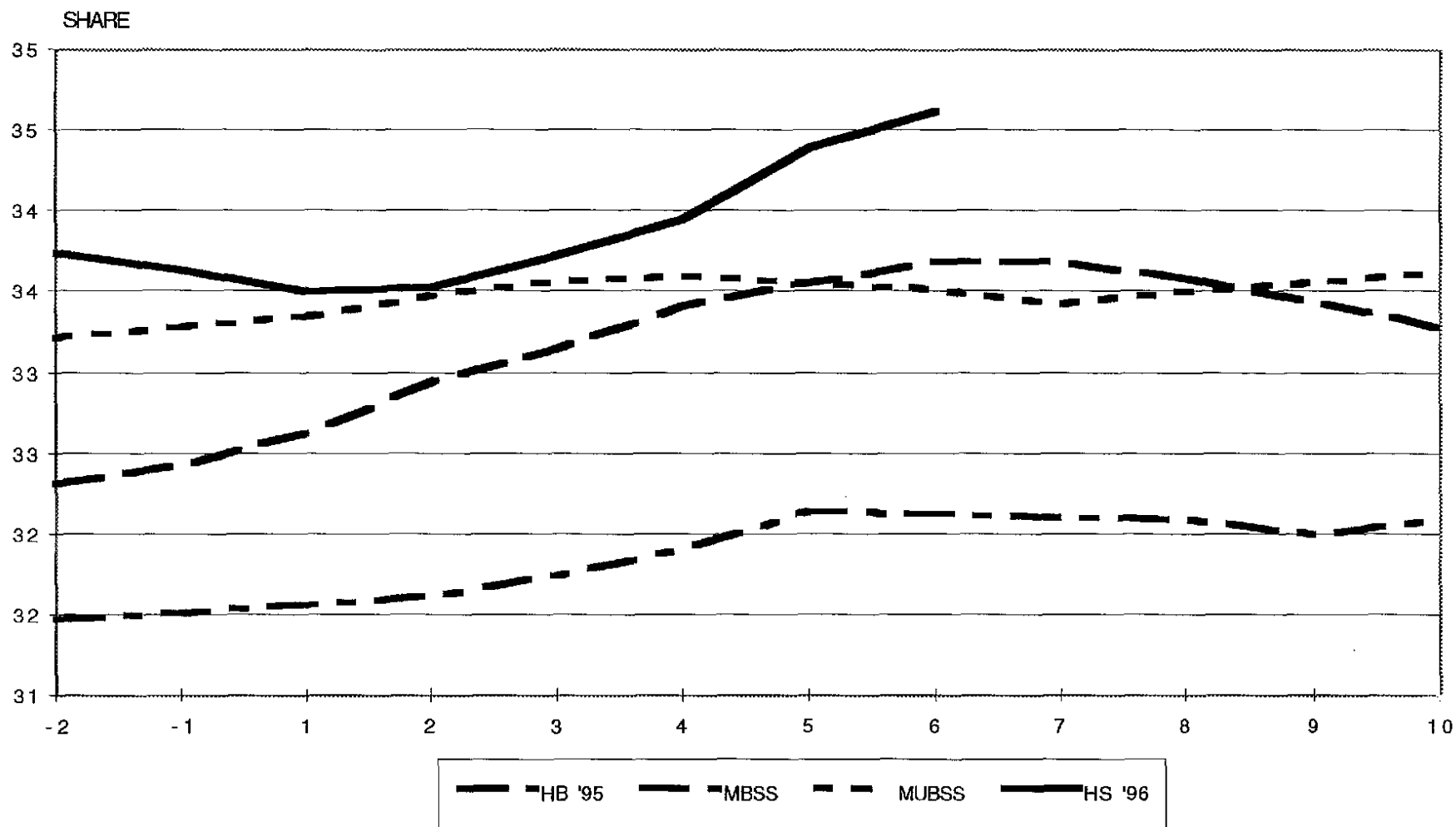


Source: Nielsen (4wk)

2071844600

# PM-USA

## MARLBORO FOUR WEEK MOVING SHARE AOC

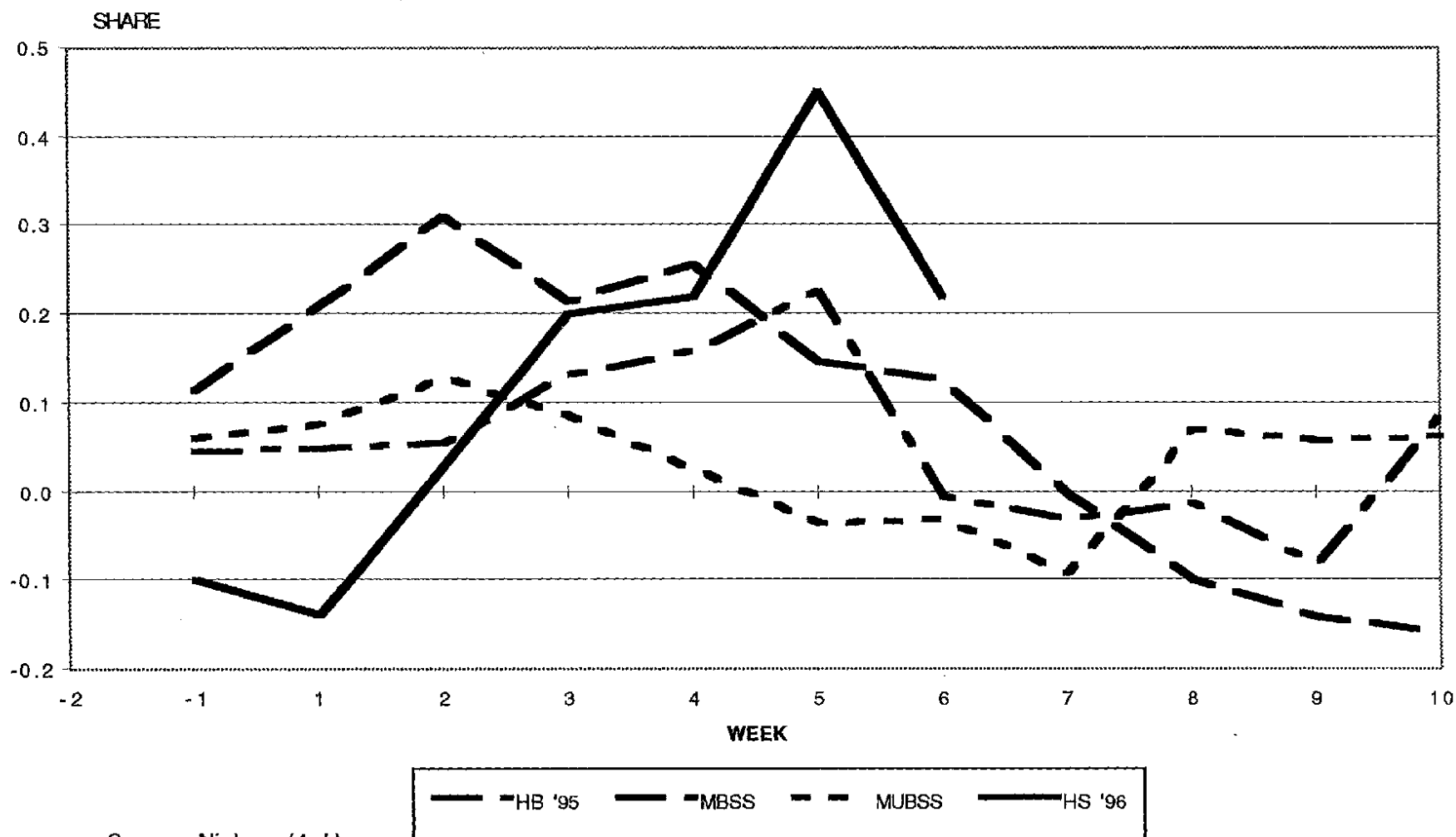


Source: Nielsen (4wk)

2071844601

# PM-USA

## MARLBORO AOC SHARE CHANGE - 4 WK VERSUS 1WK AGO



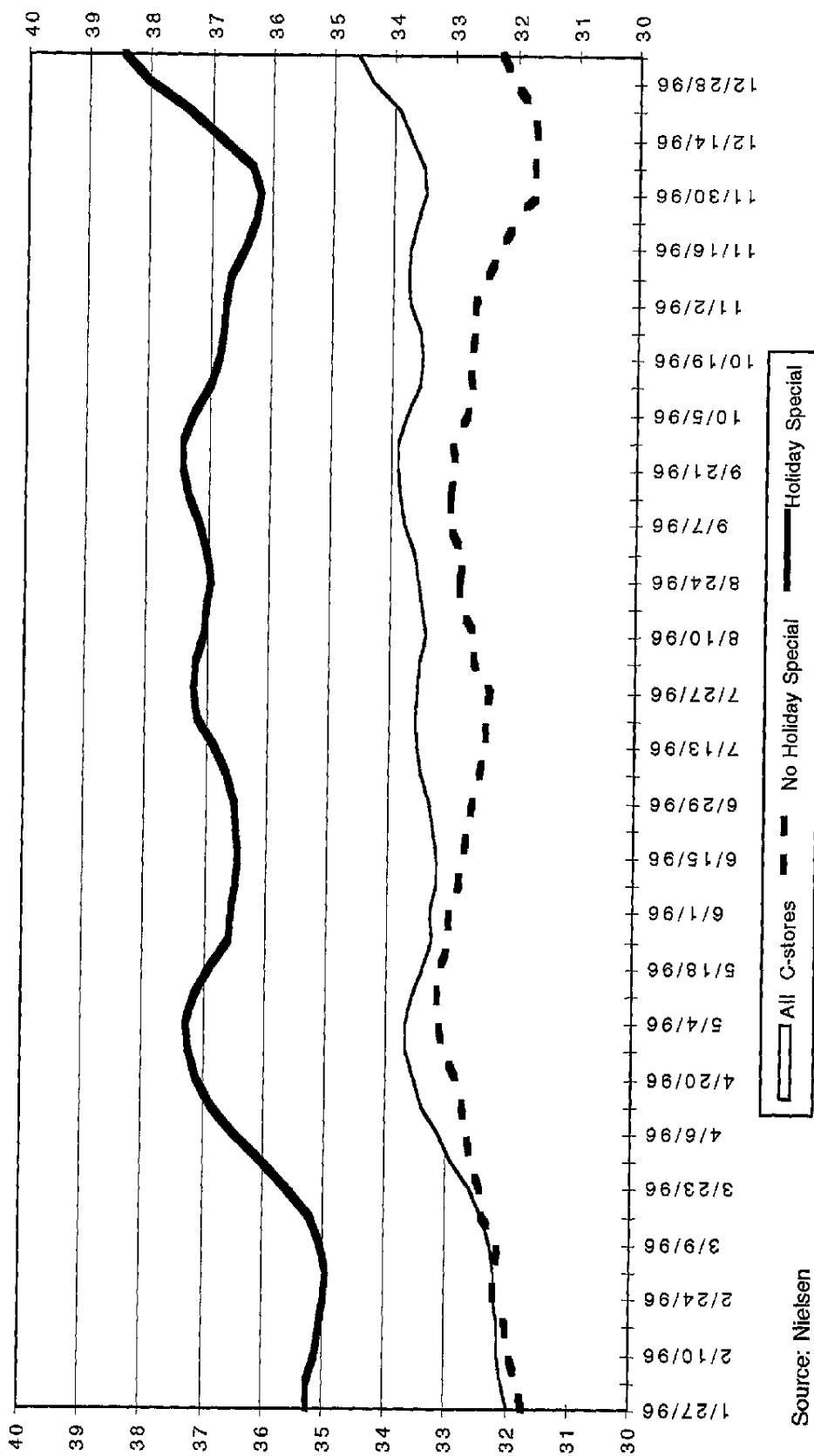
Source: Nielsen (4wk)

2071844602



# PM-USA

## MARLBORO SHARE TREND IN C-STORES WITH AND WITHOUT HOLIDAY SPECIAL MONEY-OFF

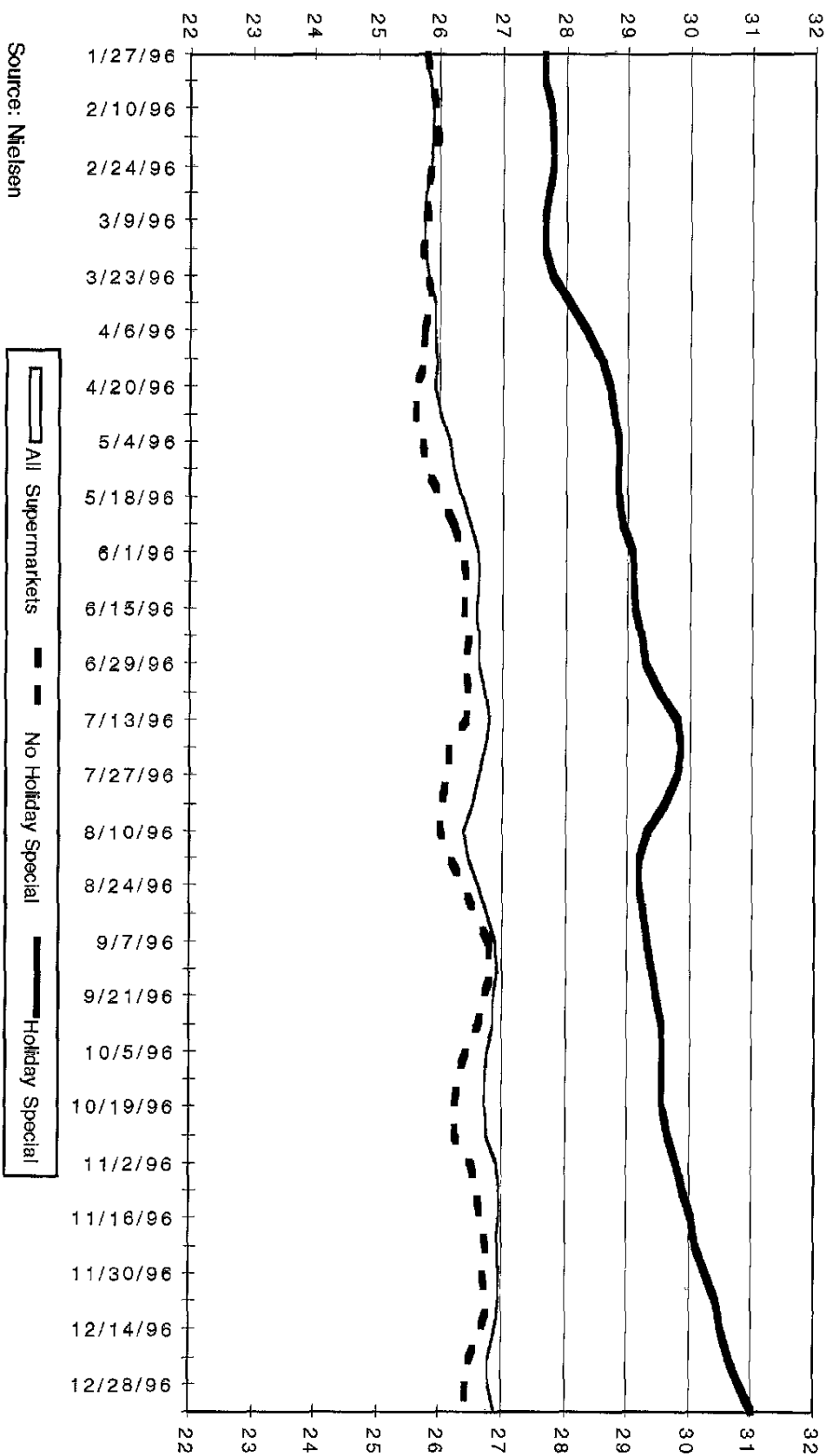


Source: Nielsen

2071844603

# PM-USA

## MARLBORO SHARE TREND IN SUPERMARKETS WITH AND WITHOUT HOLIDAY SPECIAL MONEY-OFF



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2071844605

**BACK-UP**

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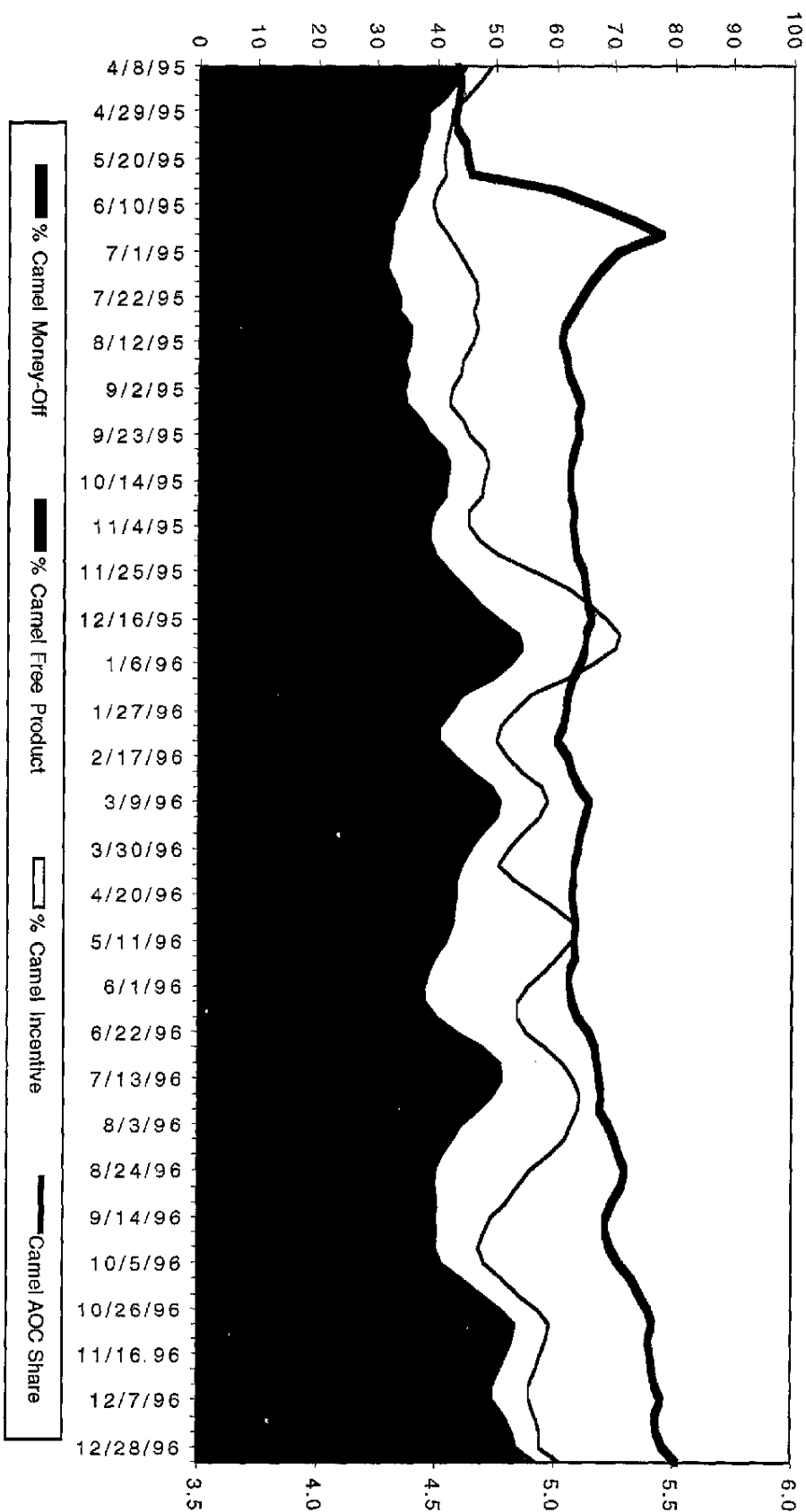
**PM-USA**

# PM-USA

% OF STORES

## CAMEL C-STORE PROMOTIONAL INCIDENCE & AOC SHARE

SHARE

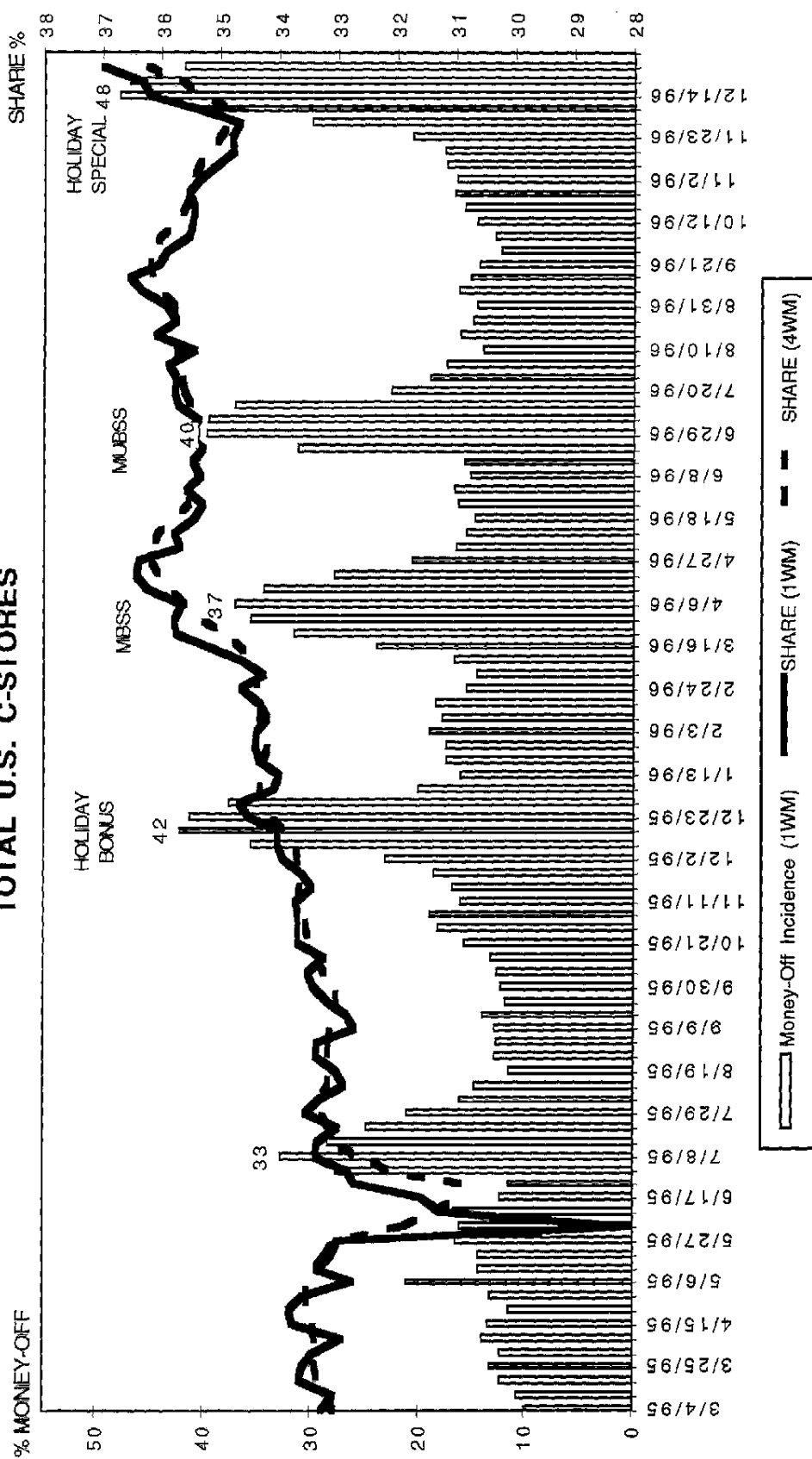


Source: Nielsen (4wk)

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# PM-USA

## MARLBORO TOTAL U.S. C-STORES



Source: Nielsen

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